The LegalOffice LA Administrator Manual

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PEAPOD LegalOffice®
The Software Suite For The High Street Firm

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This Manual is a guide to the Administrator menu available to all Users with Administrator access rights to the LegalOffice LA (LOLA) system.

If you have any queries, you can browse to - http://www.legaloffice.com and click Support Login, to log a call with us online that we will deal with as soon as possible. This is the quickest way to get an answer to any query that you have. Alternatively you can telephone our helpline on 0845 683 2518.

Key

In this manual there are certain conventions used to identify actions and describe details that you will see on the screen when using the program.

Navigation

Where chevrons are used this signifies how you navigate to the menu item that needs to be clicked from the tabs that appear at the top of the window. For example, ***Administrator>Configuration>Company Details*** means point to the Administrator tab and from the items that appear, point to Configuration and then click on Company Details.

Italics

Where a word appears in italics, this is describing the name of a box on the screen

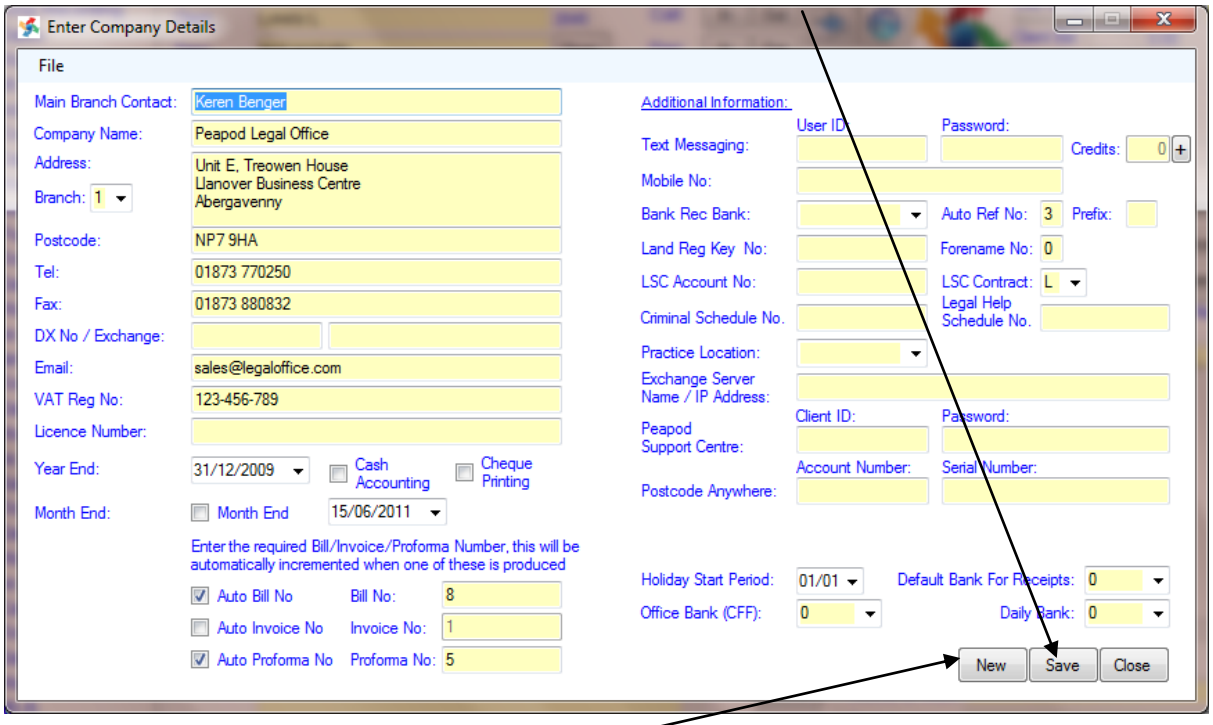
Bold

Where a word or words in a paragraph are in bold, this describes the name of a button in the window

Enter or Amend your Firm's Details

Select the ***Administrator>Configuration>Company Details*** option from the menu bar at the top of the Window this opens the Enter Company Details Screen. **NB** Only a User with combined Administrator and Partner User Access Rights can do this.

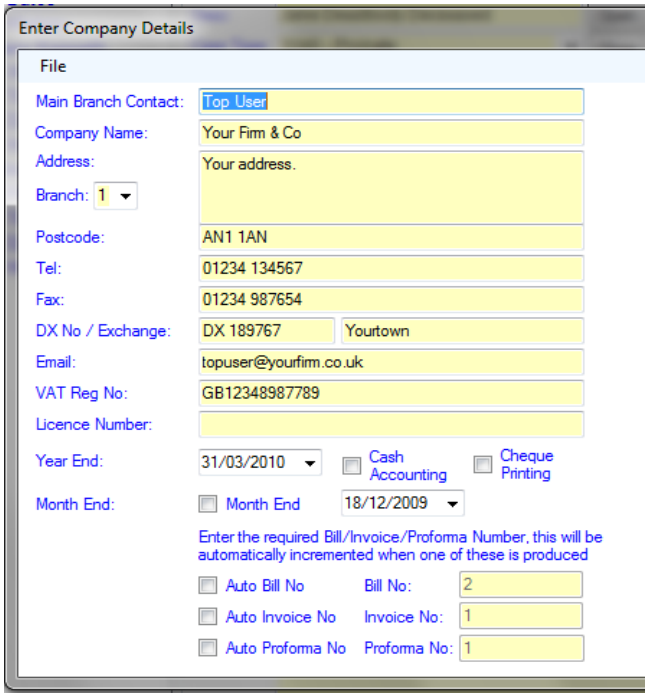
Here you may either fill in or amend your Company Details. Then click **Save** and the **Close** button to confirm.



If you have more than one branch then after saving the details for your Head Office as Branch 1, click on the **New** button and enter the details of the next branch in your organisation. Continue until you have entered details for all your branches that will use the system.

The **Email:** field is for a general address for the Firm.

Entering Accounts Preferences



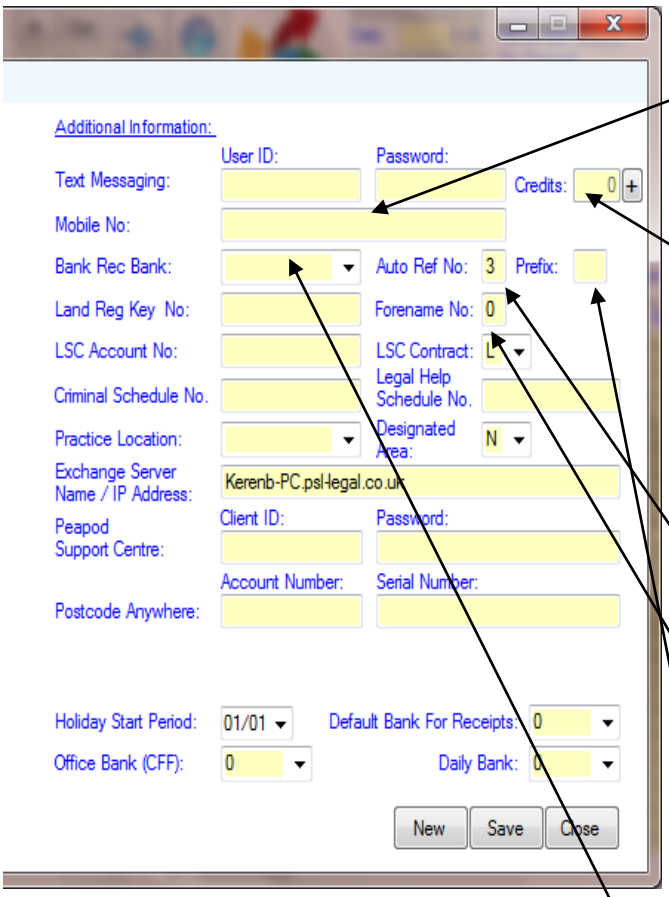
The Fields and boxes on the lower left of the Company Details Screen relate to setting up the Accounts part of the system.

Here you enter your Firm's Year-end date; select whether you wish to use a cash accounting system and invoke the Cheque printing option that is available in Accounts.

You can also choose how much to automate the system by ticking the Auto Bill No Box. This will make the system generate sequential bill numbers when Users create bills. The same is true for Invoices received from suppliers and Proforma Bills created by Users. Select each by clicking their tick-boxes. The fields on the right allow you to specify what number the next Bill, Invoice or Proforma will be.

Additional Company Information

The fields on the right hand side of the Company Details Window allow you to configure the system.

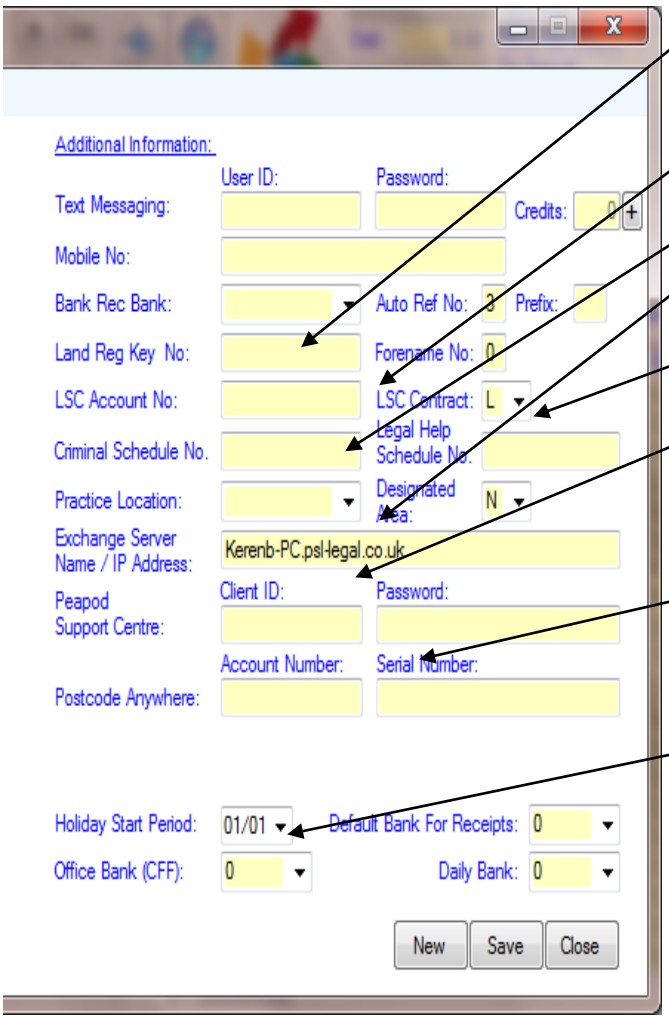


You can enter the Text Messaging Access details if you have bought that facility. The mobile number you enter is included in every text as the one from which the text message was sent.

The Credits box allows you to see how many text credits you have remaining and the + button allows you to choose a bundle of credits to purchase from our 200, 500, 1,000, 5,000 credit bundles. An email is then sent to us using your outlook email and you will be invoiced accordingly and your remaining credits increased.

The Auto Ref No; Forename No and Prefix: Fields determine how LOLA will generate reference numbers when new cases are created. Auto Ref No: determines the number of Alpha Characters from the Client's surname, or the Company Name, that will go in front of the Case Reference number that LOLA will assign to a Client. The Forename No. determines how many letters are taken from the Client's Forename and put after the letters from the Surname. You can have up to 4 from the Surname and 3 from the Forename. If instead you complete the Prefix box, you can specify a single letter or number that will appear at the start of the Clients reference. In either case, the remainder of the reference will be numeric. You can choose letters from the client's name or a single prefix letter or number but not both.

The Bank Rec Bank is the default bank that the Automatic Bank reconciliation system in the Accounts side of LOLA will use when running the bank reconciliation function.



Your firms Land Registry Key number goes here.

If your Firm does publicly funded work, the LAA Contract Type and Account Number are entered on this page as are the Criminal Schedule number and Legal Help Schedule number.

If your firm use a Microsoft Exchange Server you should enter the Exchange Server name or its IP address here so that the system can use the Outlook diary functions that exist in LOLA Our Support Staff will set this up for you.

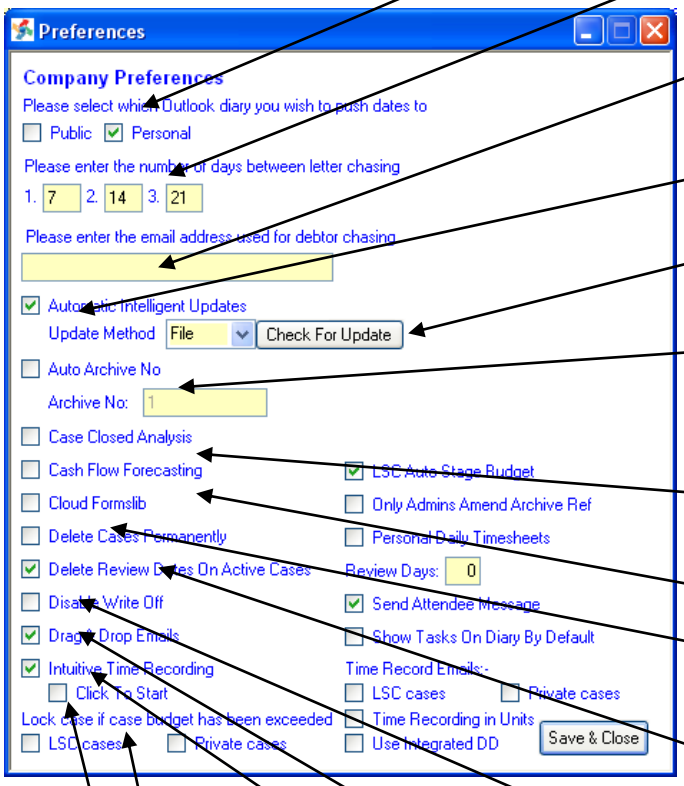
Your Peapod Client ID and password are entered on this page so that LOLA can interact with our Support Centre when you log a call over the internet.

If you have purchased the Postcode Anywhere module (which enables LOLA to complete addresses for you from Post Code data) you enter the account number and serial number here.

Here you set the date that your Holiday Year runs from.

Setting Company Preferences

Select ***Administrator>Configuration>Preferences*** to bring up the preferences selection screen. Click Save & Close to confirm the options you want.



Key Dates from the system can be sent to the User's personal Outlook diary or to a public shared diary.

This is your Firm's policy for the intervals between sending letters regarding outstanding bills (Credit Control).

If you chase debts by sending emails rather than letters, this reply address will be used in the emails.

The system will update its files over the Internet as new versions are released. Tick this box to ensure that your software is always up to date.

You can check for an update by clicking on this button

This option allows an auto archive reference to be selected. You can set a specific number at which you want this referencing to start and from that point onwards, each case you archive will be incremented by one.

When this option is turned on, case analysis information will be displayed when completing a case.

By ticking here you enable Cash Flow Forecasting

When this option is ticked LOLA will automatically use the latest version of a form from our Cloud server.

When turned on, this option will remove a case permanently when choosing to delete a case from the File menu. When turned off, LOLA will move the deleted case to the recycle bin.

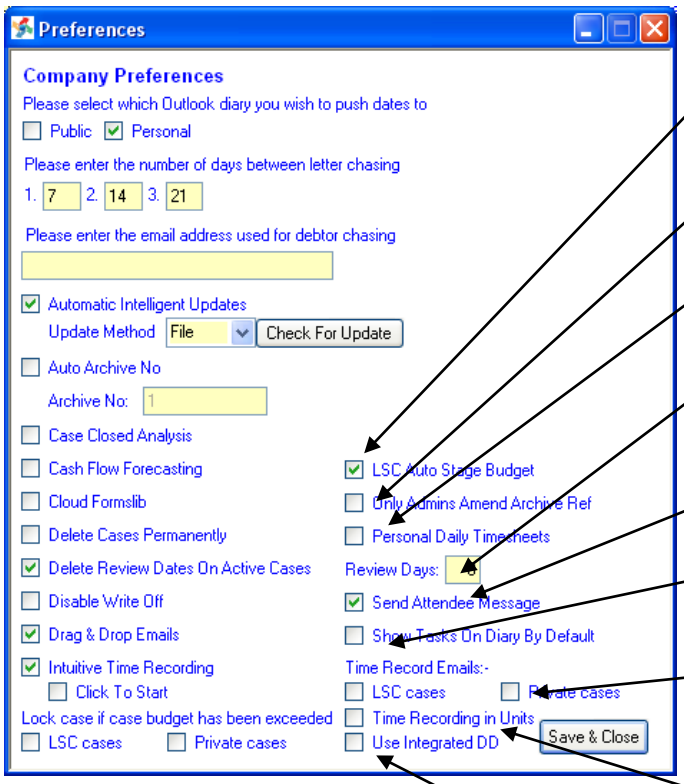
This gives the option for users to delete Review Dates. Turning this off would mean all users would be unable to change the date type of a review date and the user assigned.

Ticking here will stop non Partners or Cashiers from writing off time in the Time Records

Emails dragged into LOLA, will be added to the Case History.

By turning on this option, you turn on the intuitive Time recording , which will automatically time record on a case as soon as it is opened in LOLA. By then clicking the **"Click to Start"** the timer will be paused as default until you click it.

You can choose to make a case read only if the WIP on the case exceeds the budget. Only an Administrator can override this.



In public funded cases you can choose to have LOLA update Case Budgets Automatically if they are exceeded.

Only Administrators can enter or amend the Archive Ref on a case.

You can set whether non-administrator users see Daily Timesheets. Ticking the box will keep timesheets private. If not ticked every user will be able to see others timesheets.

Enter the number of days from Date Opened required for the first Review Date on a new case. If left blank the default of 1 month will apply.

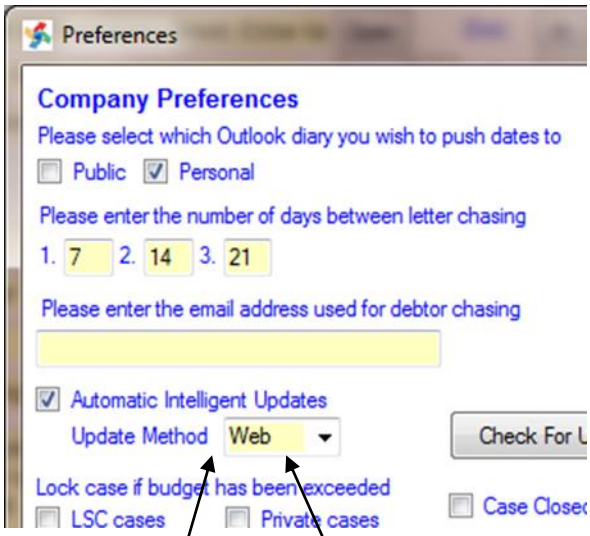
When this option is ticked LOLA will send a notification via the Tasks and Messages screen to any user assigned as an 'Attendee' to a date.

When this option is turned on the *Case Dates* and the *Office Diary* screens will default to tasks being shown.

Turning this option on allows automatic time recording of emails in and out. Emails on LAA matters are time recorded as Letter Out or Letter In.

You can choose to record time in Units of 6 minutes and/or you can choose to use Intuitive Time Recording or you can choose neither of these. See the effect of your choice below.

By turning on this option you are choosing to use the integrated Digital Dictation package with LOLA, this allows you to save to and retrieve dictated files from the Case History.



File Updates

The **'Update Method'** drop down allows administrators to control when LOLA updates are sent out to their users. The options are **'WEB'** and **'FILE'**.

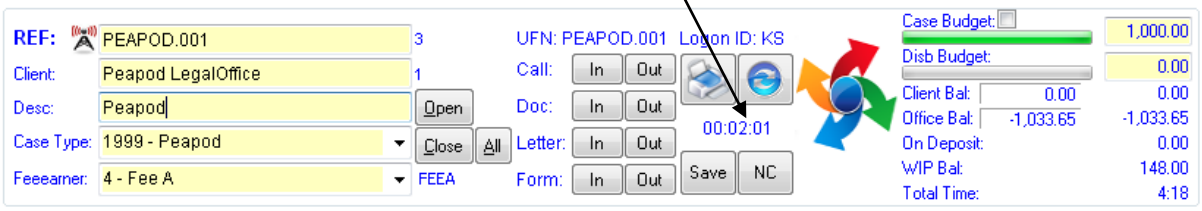
When an Administrator logs in and an update is available, they will be prompted as such and by clicking 'Yes' will download the latest update files from the Peapod website, into the 'L:\Legaloffice\System\Updates' folder and the update will be executed from there.

All LOLA users will automatically use the **'FILE'** method of updating and so when logging in, or using the check for updates button LOLA will execute the update from your 'L:\Legaloffice\System\Updates' folder, instead of all users downloading from our Peapod Website.

Time Recording

Intuitive Time Recording

If you configure LOLA to use Intuitive Time Recording, a 'clock' will appear in the main screen at the top when a User opens LOLA. **NB.** A User must have Fee Earner status to use Intuitive Time Recording



The Clock starts whenever a User performs an action, such as opening another case, moving to another part of the same case, or refreshing the screen. The clock will capture the amount of time a User spends on a case accurately. As the User moves between cases, the time on the clock is saved for each case, until it has been committed to the Time Records. The clock can be paused, and re-started by clicking on it. It will change from blue to red when paused.

N.B. If the **"Click to Start"** option is ticked in the company preferences then the timer is paused by default until clicked.

There are three Methods to commit time recorded by the clock to the Time Records, all will result in (a) the clock restarting from 00:00 and (b) the time being added as a 'Preparation' Activity Code, charged at the Users Time Recording Rate 1.

Method 1

All outstanding time will be committed to the Time Record for each case viewed when LOLA is closed. The Daily Timesheet will then pop-up and show the User all their time entries, for the day.

Method 2

When a case is closed, the outstanding time on that case, will be committed to the Time Records.

Method 3

Click the **Save** button next to the clock. This allows the User total control over when to commit time spent on a case. Using this method allows the User to round up the time to the nearest 6th minute (unit), and enter a description of the work done on the case. The **NC** button (non-chargeable) does the same, but commits the entry to the AA.001 admin Case, without any value. This keeps a record of the time spent but does not charge the client's Time Record.

Intuitive Time Recording will not work for any LOLA user who is not a Fee Earner (FE).

There are 5 virtual clocks for each Case in LOLA. Any FE that logs on to a Case is assigned a Clock. If a FE leaves a Case without committing time, then that uncommitted time is saved in the clock allocated to that FE. Therefore if there are 5 FEs with Uncommitted time on a Case, A 6th FE that opens it, will be warned which 5 other FEs have uncommitted time. The 6th FEs time will have to be recorded manually.

LOLA will only commit time, if the clock has more than a minute recorded on it.

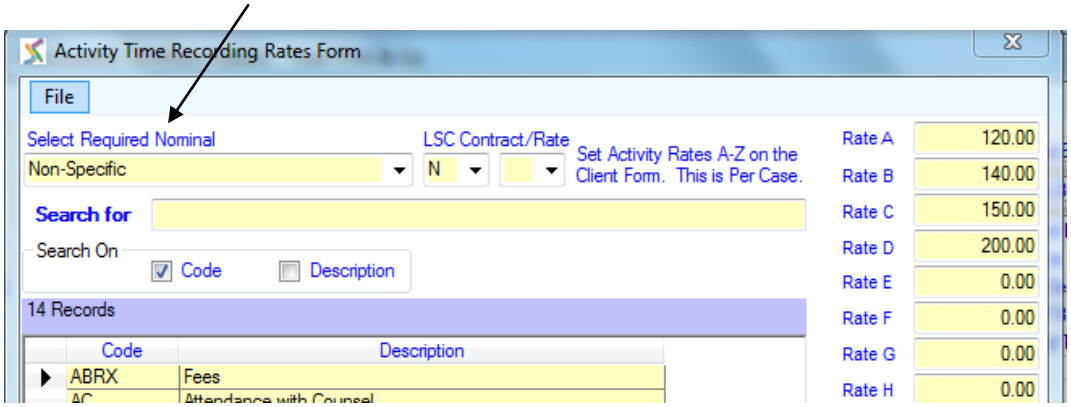
Time Recording in Units (Private cases only)

If 'Time Recording in Units' is set as a Preference and a User produces a Letter or Call In/Out, the item will be charged at one tenth of the Activity Rate Value assigned to that activity. For example, if you set a Letter In rate of £10, the total value of the line entry will be £1.00. If you do not select Time Recording in Units then when a User creates a letter with a Letter In rate of £10, the total value of the line entry will be £10. This is a system wide choice so all Users must operate Time Recording under the same conditions. If you have also ticked the Intuitive Time Recording box then when a User clicks the **Commit** button on a Case, LOLA will ask if they want to round up the time recorded to the nearest unit of 6 minutes.

Activity Codes

Select the ***Administrator>System Setup> Activity Codes*** option. This opens the Activity Time Recording Rates window and shows the codes that are set as a default in the system under a "Non-Specific" Case Type. **N.B.** If you want to use the same Activity Codes for all Private work then do not add new codes to other Case Types. All other Case Types will then see the list of Activity Codes set in the Non-Specific Case Type list. This means that if you want to change Activity Codes across all private Case Types you only have to change those in the Non-Specific Case Type.

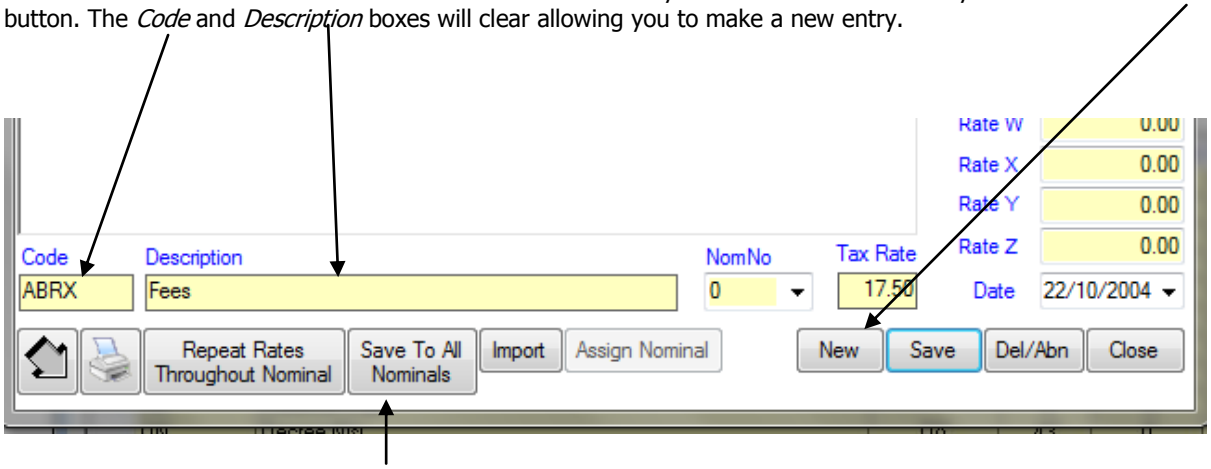
Alternatively, if you prefer, you can set different Activity Codes in each Case Types. **N.B.** Public Funded work has Case Types in the range 1800 – 1899 and the Activity Codes and rates for these are fixed. They update as necessary with the automatic software updates. To see the Activity Codes for any particular Case Type, click the arrow for the *Select Required Nominal* drop-down box.



Then click on the Case Type you require and the window will display the Activities associated with that Case Type. The rates set for each Activity appear in the boxes on the right hand side of the window, when you click on the Activity. You can add, amend or delete these activities and change the rates applicable to each one.

Adding a New Activity Code

At the bottom of the window are control buttons that allow you to create a new Activity Code. Click the **New** button. The *Code* and *Description* boxes will clear allowing you to make a new entry.



Type in a new code (which must be different from an existing one) and give it a description. If the Activity is only to apply to one particular Case Type select its number from the *NomNo* drop-down box. Once you have set up an Activity Code in one Case Type you can save that Code to all the Case Types in the system by clicking the **Save to all Nominals** button. You may find it easier to just work with the Non-Specific Case Type as it will be simpler to maintain your Activity Codes across the Firm if everyone uses exactly the same set. **N.B.** If a "MISC" activity code is added , you can use it to bill fees along with standard time recording entries in the same bill. (see User manual for how to use this activity type)

Amending an Activity Code

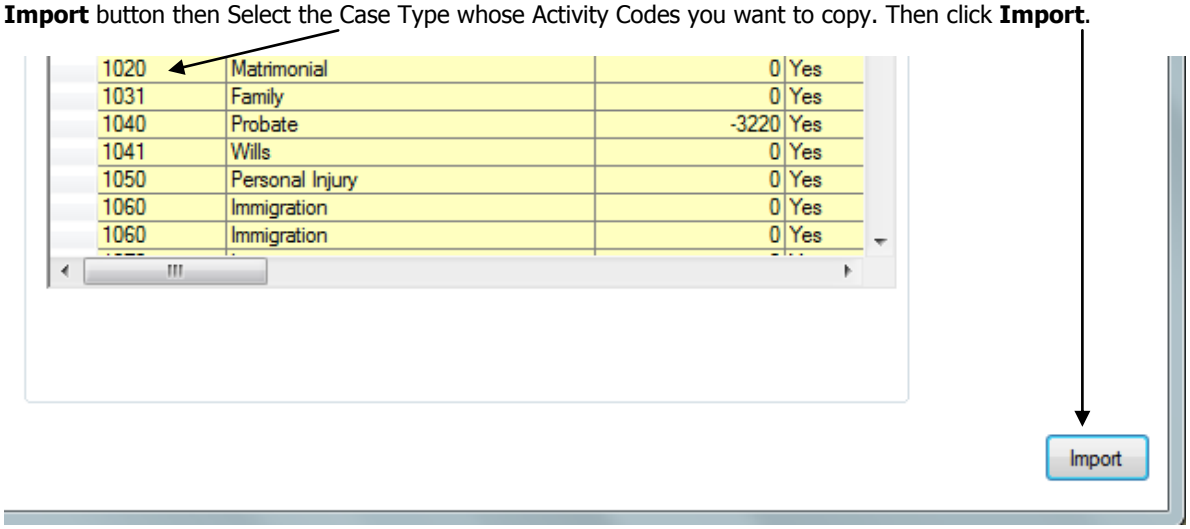
To amend a Code click on it in the grey box to the left of it in the main window so that the details appear in the boxes at the bottom. Overtype those details in the *Description* box and then click the **Save** button.
N.B. The CO,CI,EO,EI,FO,FI,LO,LI,XO & XI activity codes are now reserved by the system and cannot be amended

Deleting an Activity Code

To delete a Code click on it in the main window so that the details appear at the bottom. Then click the **Del/Abn** button. Confirm your wish to delete the Code when asked. If LOLA has already recorded any time using the type of Activity Code that you want to delete (in any kind of Case Type) it will not allow the Activity Code to be deleted.

Copying Activity Codes from one Case Type to another.

In order to simplify the creation of Activity Codes you can copy codes from one Case Type to another. Click the **Import** button then Select the Case Type whose Activity Codes you want to copy. Then click **Import**.



The codes from that Case Type will now appear in the original Case type. In order to complete the copy, click the **Assign Nominal** Button and confirm your wish when asked.

Copy Activity Charging Rates throughout A Case Type

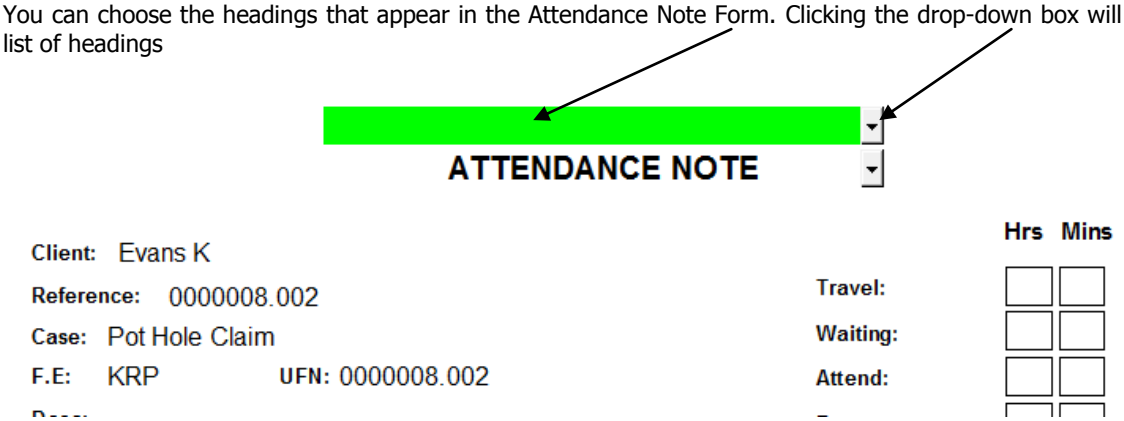
If you want the same rates to apply to each Activity Code in a Case Type set the rates up for one Activity Code and then click the **Repeat Rates Throughout Nominal** Button. This will copy the rates set for that Activity to all the other Activities in the Work Type

Importing LAA Rates/Fees

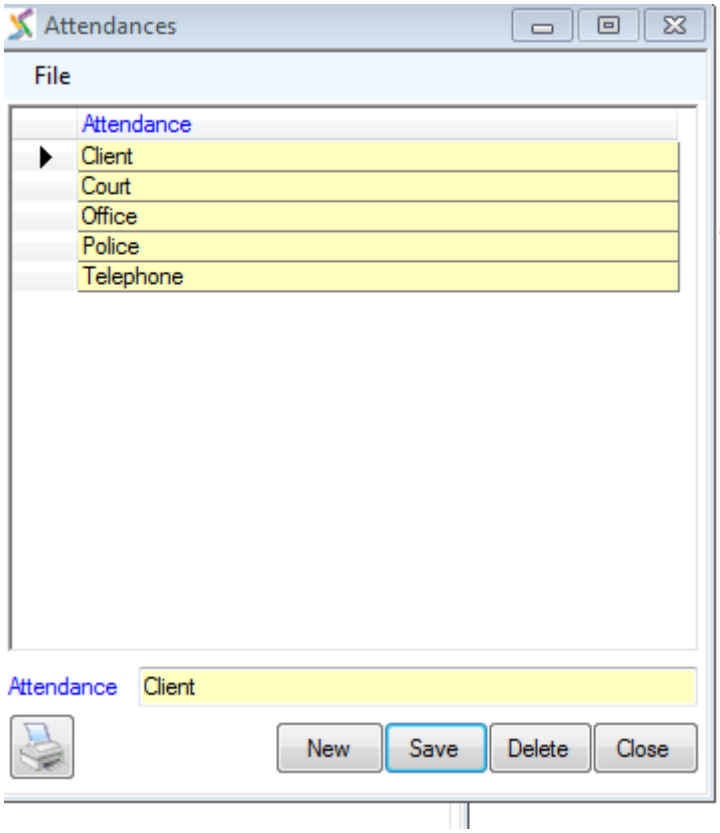
There is now an option to import LAA codes, Rates and fixed fees under the System Setup menu under the Administrator function.

Attendances

You can choose the headings that appear in the Attendance Note Form. Clicking the drop-down box will show a list of headings



Select the ***Administrator>System Setup> Attendances*** option. This will open the Attendances window.



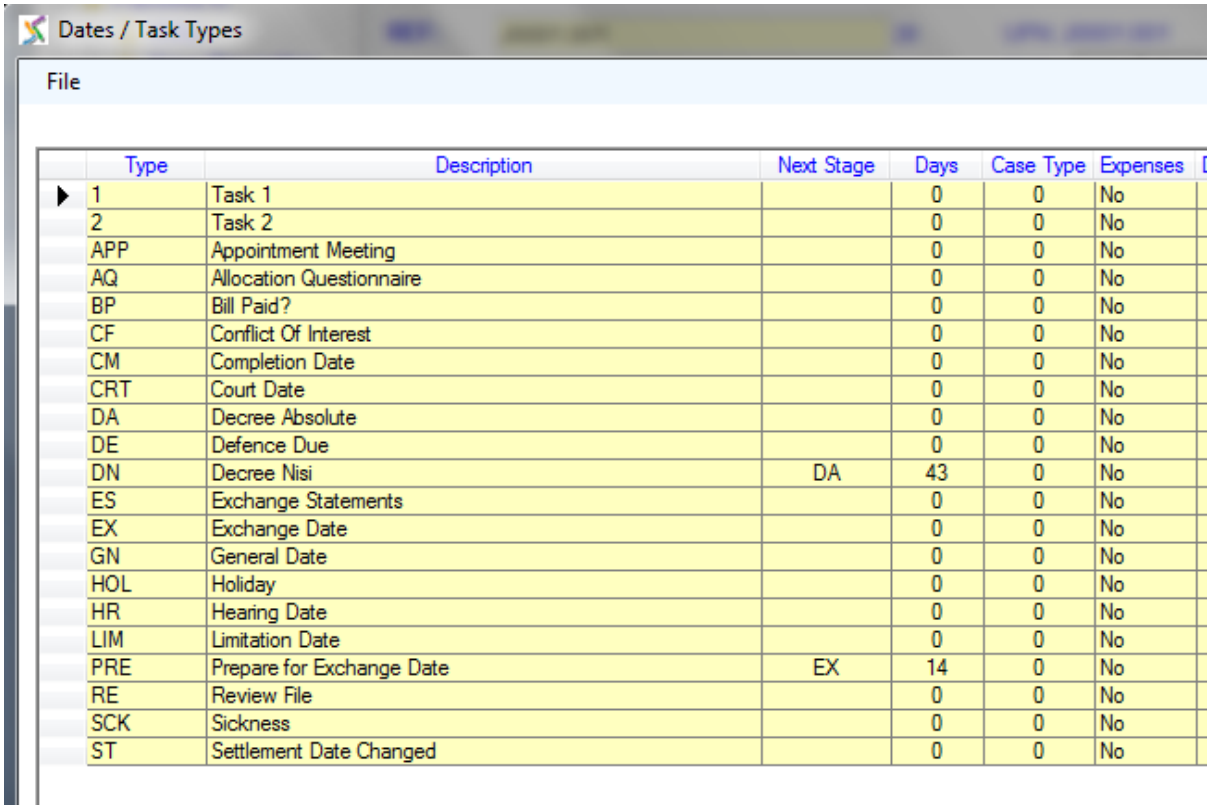
Click the **New** button to create a new entry in the list. Type the description that you want and click the **Save** button. You can edit any entry by highlighting it in the grid (click the grey box to the left of the item) and then edit the details that appear in the box at the bottom of the window.

To delete an entry, highlight it then click the **Delete** button. When you have finished working on the list click the **Close** button.

Dates and Tasks

You will find a number of pre-installed key dates but an Administrator can add, amend or delete these as required. Key Dates have alphabet Type-codes and Tasks have Type-codes that are numbers.

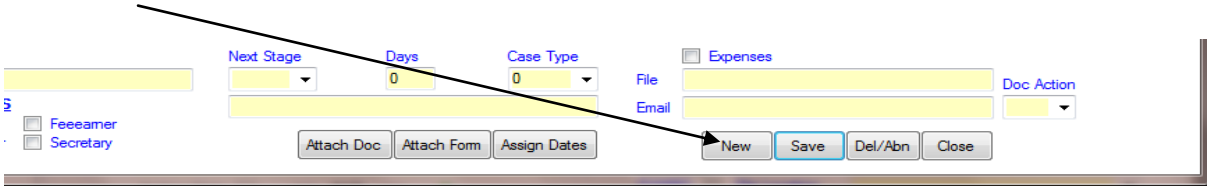
To open the Dates / Task Types window select the ***Administrator>System Setup> Date Types*** option.



Type	Description	Next Stage	Days	Case Type	Expenses
1	Task 1		0	0	No
2	Task 2		0	0	No
APP	Appointment Meeting		0	0	No
AQ	Allocation Questionnaire		0	0	No
BP	Bill Paid?		0	0	No
CF	Conflict Of Interest		0	0	No
CM	Completion Date		0	0	No
CRT	Court Date		0	0	No
DA	Decree Absolute		0	0	No
DE	Defence Due		0	0	No
DN	Decree Nisi	DA	43	0	No
ES	Exchange Statements		0	0	No
EX	Exchange Date		0	0	No
GN	General Date		0	0	No
HOL	Holiday		0	0	No
HR	Hearing Date		0	0	No
LIM	Limitation Date		0	0	No
PRE	Prepare for Exchange Date	EX	14	0	No
RE	Review File		0	0	No
SCK	Sickness		0	0	No
ST	Settlement Date Changed		0	0	No

Add a New Date or Task

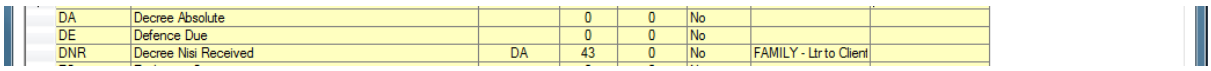
Click the **New** button at the bottom of the Window.



The boxes at the bottom of the Window will clear allowing you to put in details of the new Date or Task.

Enter the code in the *Type* box first. Remember that the code must be unique. It cannot be the same as any codes already in the system. Type a description for the Date or Task then decide whether to link this date to the next stage in a matter.

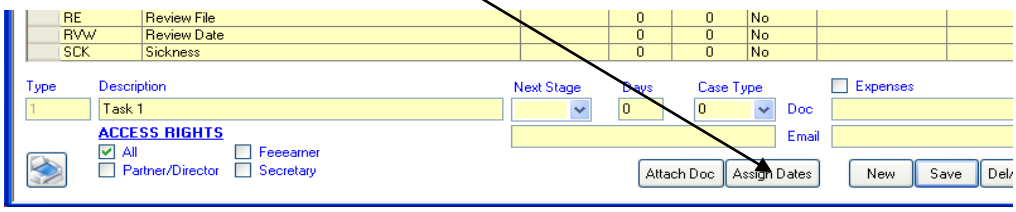
In the example below, you can see that the Decree Nisi Date is “linked” to the Decree Absolute Date. This means that the Decree Absolute date will appear in the Fee Earner’s Diary in 43 days time from the date the Decree Nisi Date was activated in the Workflow. You can also attach a Word Document, an Email or a form to a Date or Task so that it is produced when the User clicks the Doc or Email buttons that appear when a Date or Task is activated. In this example a letter to the Client advising Decree Nisi has been received is linked to the date.



If you wish to abandon the new entry rather than save it, click the **Del/Abn** button. Otherwise, in order to add any new date to the system you must click the **Save** button.

Assign Dates

You can use the **'ASSIGN DATES'** button to assign dates under an unwanted date type already used in the system to a new Date Type.
You can do this by highlighting the unwanted date type, clicking the 'ASSIGN DATES' button and selecting the specific Date Type required from the pop-up list that appears.
However, be cautious when using this facility as it cannot be reversed.



Set Access Rights for Dates and Tasks

You can choose which types of Users are able to amend, delete or mark a Key date type or a task. By default all Dates and Tasks can be edited or deleted or marked by everyone.

However ticking the relevant *Access Rights* tick box will set which type of User can modify a particular type of date or task. This can be useful where Partners want to ensure that certain key dates (e.g. Case File Review Dates) can only be marked as done by a Partner.

Amend a Date or Task

To amend a Date or Task click on the grey box at the side or the entry you wish to amend so that the details appear in the boxes at the bottom of the window. If you want to change the Type Code, make sure that the new code you choose is unique and not already in use. Once you have made the changes you require click the **Save** button.

Delete a Date or Task

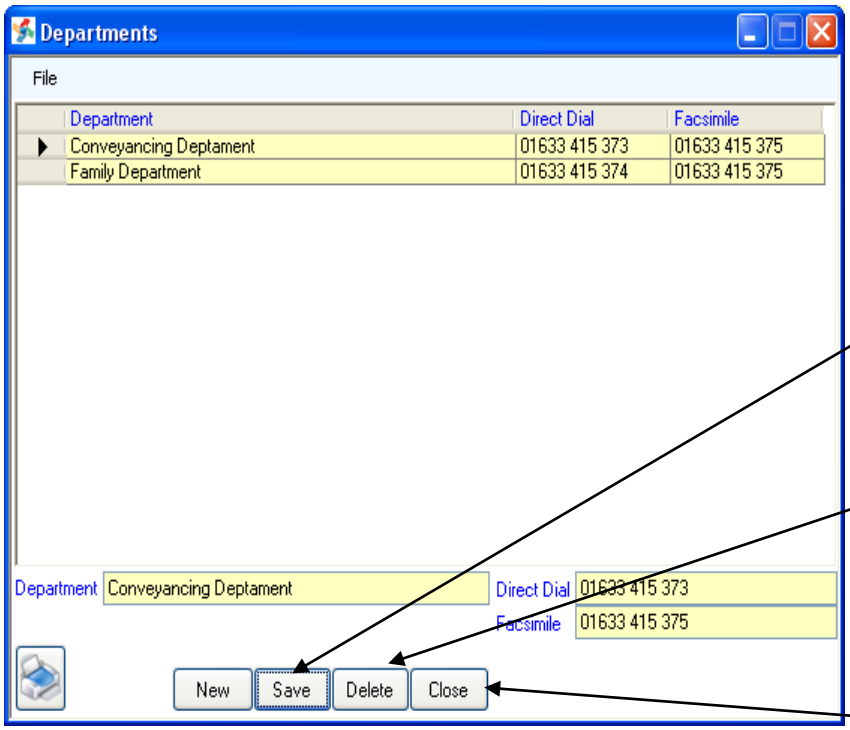
To delete a Date or Task click on the grey box next to the entry you wish to delete. Once its details appear in the boxes at the bottom of the window click the **Del/Abn** button. Click yes when asked to confirm the deletion.
Tip
Using Type codes that have some reference to the description of the Date or Task will help Users recall them when using the system and will avoid clashes when you add new codes.

Departments

In order to get the full benefits of the Office Diary you should allocate each user to a Department even if that department is just the Firm itself.

Add, Delete or Amend a Department

Select ***Administrator>System Setup> Departments*** and the Departments window will open.



To create a New department click the **New** button then type the details in the box at the bottom of the Window, including that departments direct dial number and fax number if applicable and click the **Save** button.

To delete a department select it by clicking on the grey box next to the description. The description will now be in the box at the bottom of the window. Click the **Delete** then click yes to confirm.

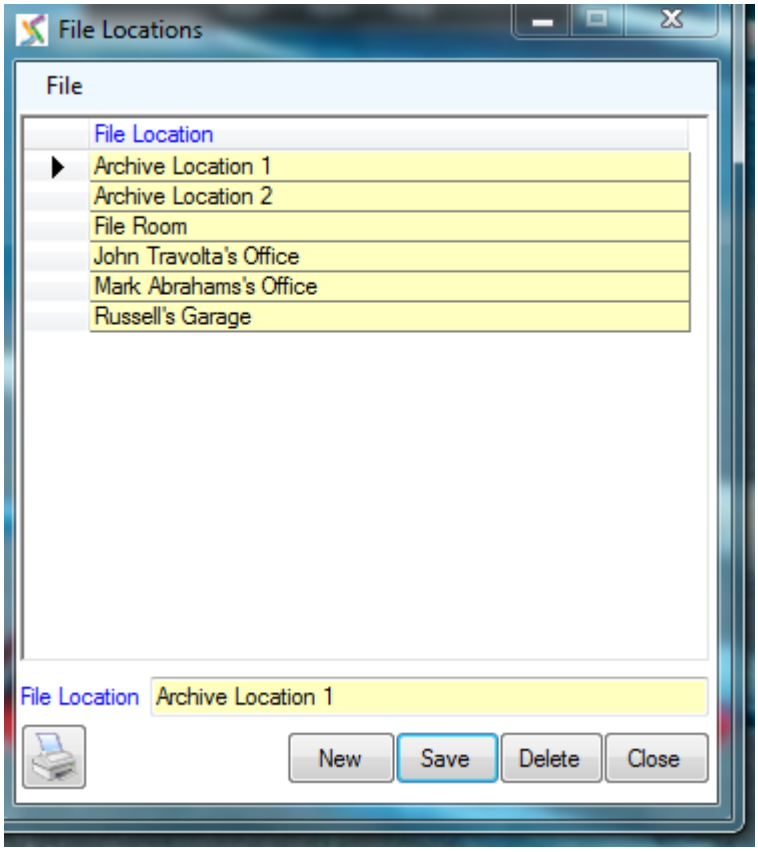
To amend a department description, click on the grey box next to its description then make the change required in the box at the bottom of the window then click the **Save** button.

When you have finished organising your phrases, click the **Close** button.

File Locations

You can specify a list of File Locations that Users will be able to see in the Client panel for a matter. This can be useful for tracking where Files should be within the premises that the Firm practices from.

To create a list of File Locations Select ***Administrator>System Setup> File Locations***
This opens the File Locations window



To create a new location, click the **New** button and type the description into the box at the bottom of the window. Then click the **Save** button

N.B. you can only have up to 50 characters (including spaces) in any description.

To amend a description, click on the grey box next to the description you want to change then make the change required in the box at the bottom of the window then click the **Save** button.

To delete a location select it by clicking on the grey box next to the location in the list of locations. The location will now be in the box at the bottom of the window. Click the **Delete** then click Yes to confirm.

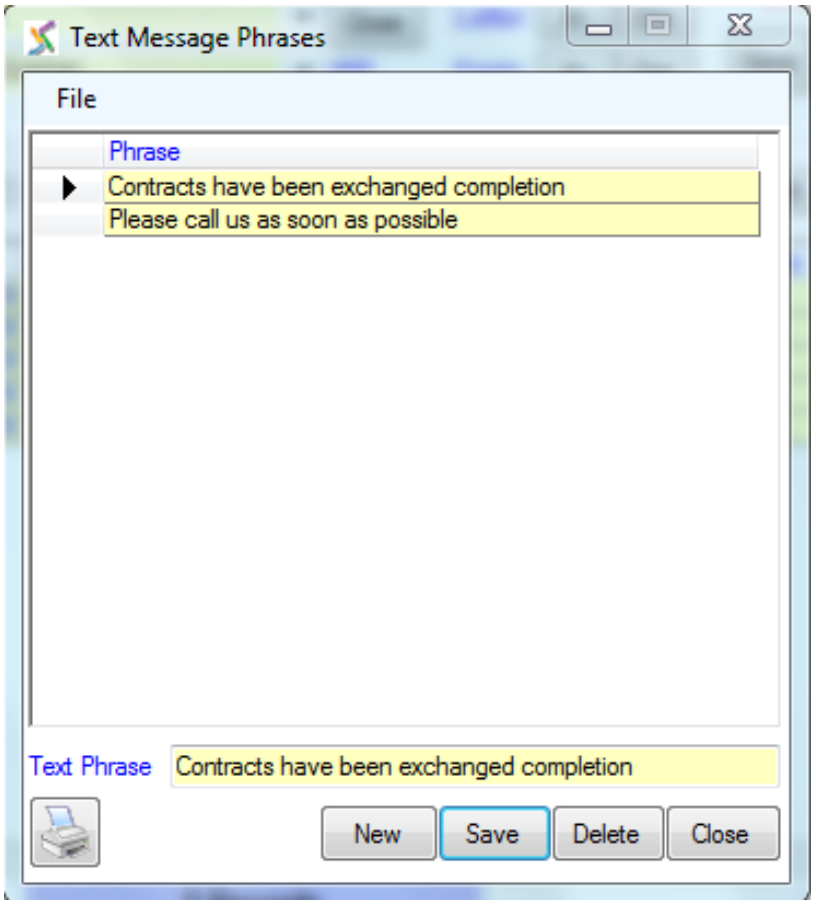
When you have finished organising your locations, click the **Close** button

Text Message Phrases

If your firm wants to use standard text messages to notify clients, providers and others of key events you can define a list of precedent text-message phrases.

Select ***Administrator>System Setup> Text Message Phrases.*** The Text Message Phrases window appears.

Add, Amend or Delete a Text Message Phrase



To create a new phrase, click the **New** button and type the phrase into the box at the bottom of the window the n click the **Save** button

N.B. you can only have up to 50 characters (including spaces) in any phrase.

To amend a phrase, click on the grey box next to the phrase you want to change then make the change required in the box at the bottom of the window then click the **Save** button.

To delete a phrase select it by clicking on the grey box next to the phrase in the list of phrases. The phrase will now be in the box at the bottom of the window. Click the **Delete** then click yes to confirm.

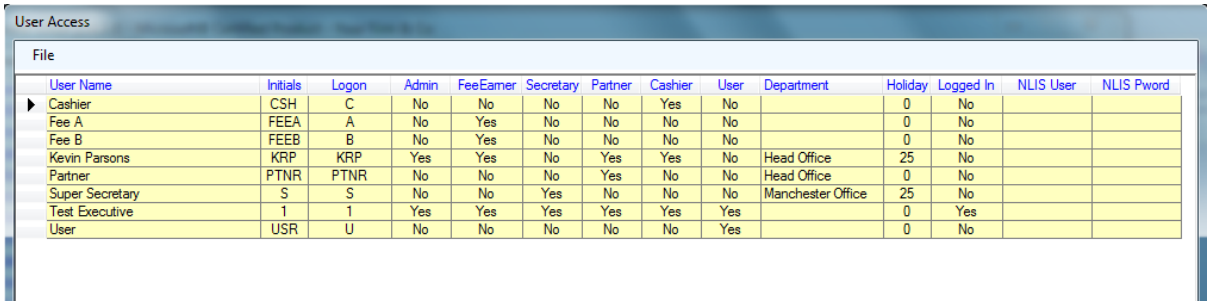
When you have finished organising your phrases, click the **Close** button

Text Messaging Credits

You purchase texts messaging credits in bundles, to see how many of these credits you have remaining yu can look under the Administrator tab, Configuration and Company details screen. The number of credits remaining can be seen at the top right-hand side of the screen, and this is paired with a '+' button to add more. This button will prompt you to enter the number of credits you wish to add to your account. After entering the number, LOLA will use your Outlook to send an email to our offices, notifying us of your request. When we have updated your credits LOLA will automatically display the new number of credits remaining on this screen.

Users

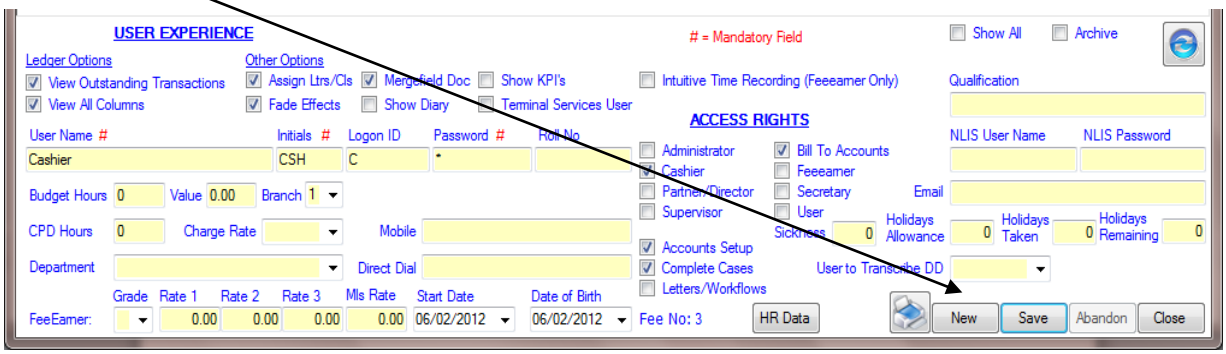
Select ***Administrator>System Setup> Users.*** The Users window appears. This shows all the Users registered to use LOLA in the top part of the window.


User Access
File
User Name | Initials | Logon | Admin | FeeEarner | Secretary | Partner | Cashier | User | Department | Holiday | Logged In | NLIS User | NLIS Pword
Cashier | CSH | C | No | No | No | No | Yes | No | | 0 | No
Fee A | FEEA | A | No | Yes | No | No | No | No | | 0 | No
Fee B | FEEB | B | No | Yes | No | No | No | No | | 0 | No
Kevin Parsons | KRP | KRP | Yes | Yes | No | Yes | Yes | No | Head Office | 25 | No
Partner | PTNR | PTNR | No | No | No | Yes | No | No | Head Office | 0 | No
Super Secretary | S | S | No | No | Yes | No | No | No | Manchester Office | 25 | No
Test Executive | 1 | 1 | Yes | Yes | Yes | Yes | Yes | Yes | | 0 | Yes
User | USR | U | No | No | No | No | No | Yes | | 0 | No

At the bottom of the window is the area where you can add new Users, amend existing User's details and take Users off the system.

Add a New User

Click the **New** button at the bottom of the User Access window.



The field boxes will clear and you can add the details of the New User. The Logon ID will default to the initials that you put into the *Initials* box, but you can amend these and the password you give to the User will be what the User has to type in the Logon screen when opening LOLA. **N.B.** a password can be no more than 10 characters long, a password strength indicator can be seen when entering a password for a user.

User Experience

In this part of the window under Ledger Options, you can set the default view that the User will see when they look at a ledger in LOLA. In the Other Options section, you can set whether the windows in LOLA fade in and out when the User moves from one screen to another. Users who access LOLA through a Terminal Services connection must have the *Terminal Services* tick box ticked. Tip: On slower computers, it is best to un-tick the *Fade Effects* tick box as doing so will make LOLA run faster. The setting *Mergefield Doc* determines whether the Mergefield Codes Document opens when the User selects the **Administrator>Letters>Amend Letters** option (see the Letters section for more details on this). If the tick box is ticked then when the Letters Folder opens the Mergefield Codes Document will open at the same time. If it is not ticked the Mergefield Codes document will not open. The default is for the box to be ticked. The *Intuitive Time Recording (Feeearner Only)* option, when ticked will turn on Intuitive Time Recording for the specified user, if this hasn't already been turned on for all fee earners.

User's Access Rights

There are various types of User. Each one has a different set of privileges to use various parts of the system as shown in the table below. Combinations of User Access Rights will provide access to additional options and buttons.

Type	Access Rights Granted
Administrator	Gives access to the Administrator Menu of LOLA; the 'Delete Case' option under the File menu and the delete button in Time Recording. If Administrator and either 'Partner' or 'Cashier' rights are granted as well, then the 'Company Details' and 'Import Codes' buttons in the Administrator Menu can be accessed.
Cashier	Gives full access to the Accounts part of LOLA including Month End and Year End routines and Full Access to Reports unless User is ticked as well, in which case, the Reports will be limited to Client Ledgers, Time Ledgers, Client Checks and Unpaid/Receipted Disbursements.
Partner	Gives access to all the client, time and financial reports available in the system. In the administrator menu access is given to the 'Retrieve Case Passwords' option (as only a partner can protect a case with a Password when it is opened). Partners are also the only type of User that can authorise Posting Slips.
Supervisor	This User's name will appear in the Supervisor dropdown list allowing them to be set as the Supervisor of a Case.
Bill to Accounts	Gives the User the ability to post a Bill they create in the Time Recording pane directly into the Client's Ledger.
Fee Earner	Gives the User access to the Case Management System and Client Ledger reports and lets the User have dates and tasks assigned to them.
Secretary	This User's name will appear in the Secretary dropdown list allowing them to be set as the Secretary on a Case.
User	Gives access to the Case Management part of LOLA but no access to the Administrator or the Accounts menus or Reports.
Accounts Set Up	Gives the user access to the System Set Up of the Accounts. This option is only effective if the user is not already an Administrator.
Complete Cases	Gives the user the ability to Complete Cases. This defaults to being turned on for all users.
Letters/Workflows	This option allows the specified User to amend Workflows and Letters (only) from the Administrator menu. This option is only effective, if the User does not already have Partner/Director, or Administrator rights.

The minimum detail you have to enter to create a user is the User Name, Initials and Password and tick one of the *Access Rights* tick-boxes. However, you can add a lot more:-

Roll No – to record a Solicitor's roll number.

Budget Hours and Value – These may be set for each User.

Branch - Click the down arrow to the right of this box to select the Branch where the User works.

Mobile – for the User's mobile phone number.

Department – Click the down arrow to the right of this box to select the Department in which the User works.

Charge Rate – When Manually time recording on a private case, then LOLA will use the charge rate for the fee earner chosen, if it is entered in this rate field; instead of the case charge rate seen on the client screen.

Direct Dial – for the User's direct dial telephone number.

Fee Earner Grade and Rates – Select the Fee Earner's Grade and set three charging rates and a mileage rate to use when time recording private work.

Start Date – The date that the User joined the Firm.

Date of Birth - Pretty obvious really!

Qualification – The User's qualification (used in Client Care Letters)

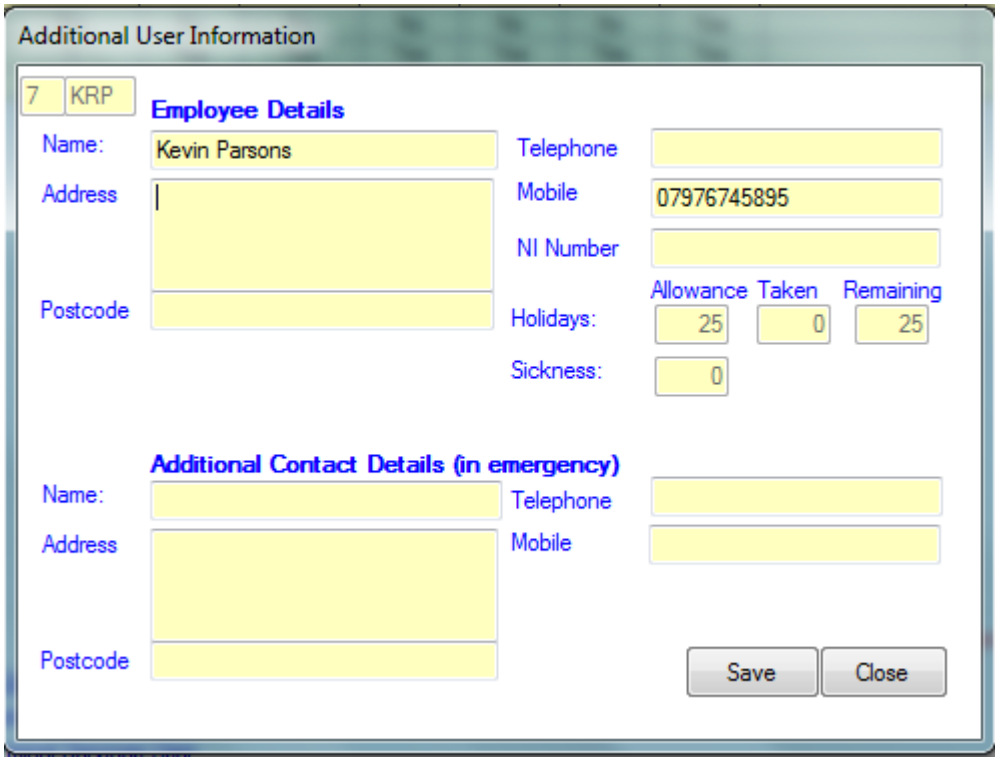
NLIS User Name and Password - If the User uses the National Land Information Service Hub their Username and Password can go in here.

Email – The User's email address

Holiday Allowance – You can enter the User's annual holiday allowance and if the User uses the Diary system, LOLA will keep a record of sickness and holidays taken.

HR Data on Users

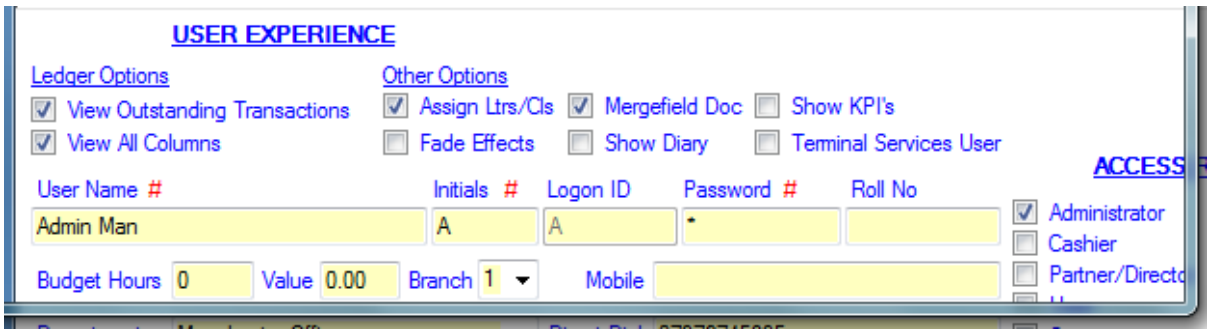
Clicking the **HR Data** button will bring up a screen where you can enter additional information about the User.



Once you have put in the details click the **Save** button then **Close**. If you change your mind and decide not to create the new User click the **Abandon** button.

Other Options

This area allows you to make various settings for a User



Ledger Options - These boxes determine whether the User will see only outstanding transactions and all columns when they look at a ledger. Tick whichever is preferred.

Assign Ltrs/Cls - Ticking this box will mean that any work done on the system will be recorded as being done by the person logged in. Un-ticking the box will show the work as being done by the Fee Earner to whom the case is assigned rather than the User who did the work (unless the User and Fee Earner assigned are one and the same). If the User is a non- fee earner then the initials of the Fee Earner for the Case are recorded.

Fade Effects – This makes the transitions between windows as they are opened or closed fade.

Mergefield Doc – Ticking this option will make the Mergefield Codes document open every time you click on the Administrator>Letters>Amend Letters command.

Show Diary - Ticking this box makes the Office Diary appear whenever the User begins to use LOLA. If it is un-ticked, the system will just show the main page on start up.

Show KPI's Ticking this box will open the KPI Dashboard every time the User logs on to LOLA.

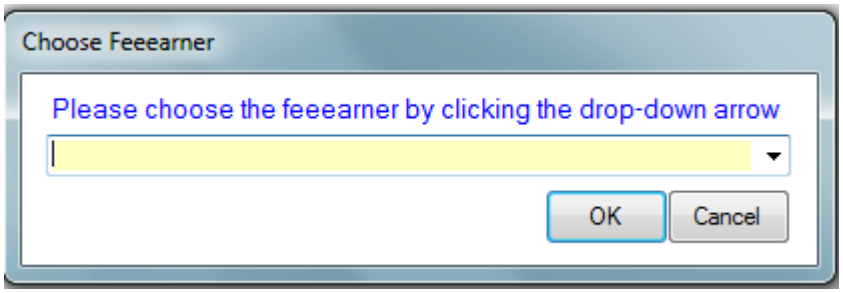
Terminal Services If the User accesses LOLA via a Terminal Services connection then this box needs to be ticked.

Amend a User's details

Click the grey box to the right of the User's name in the list of Users so their details appear in the boxes at the bottom of the window. Make the changes that are required and click the **Save** button. Clicking the **Close** button before clicking the **Save** button will cancel any changes made to the User's details.

Archive a User

You cannot delete a User from the system. However if a User leaves the Firm you can archive their User details which will stop their access the system. Click the *Archive* tick box. You will be asked to confirm your action. If you choose Yes, you will then be asked whether you wish to transfer any cases and dates from the Archived User to a current User. Clicking Yes will open the Choose Feeearner window



Select the Fee Earner to whom you want to transfer the Archived User's cases, dates by clicking the arrow on the right of the drop-down box, and then click OK. The cases and dates assigned to the Archived User will then transfer.

Restore an Archived User

Click the *Show all* tick box and any Archived Users will appear in the list. Select the User you want to restore by clicking the grey button to the left of their entry in the list and then click OK.

Print a list of Users

If you click the printer button next to the **New** button at the bottom of the User's Access window LOLA will print the list of Users as they appear in the grid at the top of the window.

Legal Services Commission

Import Codes

NB. You should only run this option if told to do so by Peapod Technical support. This will import new LAA Activity Codes. **BE AWARE** that clicking this button will overwrite any activity codes previously stored in LOLA.
Select ***Administrator>System Setup> Import Codes.*** **NB.** You will need to have both 'Administrator' and 'Partner' or 'Cashier' User rights to see this option.

Import Procurement Codes (LAA)

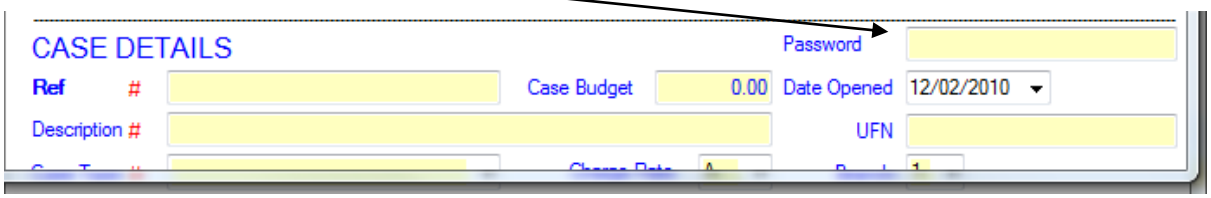
An 'Import Procurement Codes' option has now been added to the System Set Up menu under the Administrator tab. This facility will ensure that you have all the latest Procurement Codes on your system.

LAA Setup

Select ***Administrator>System Setup> LAA***
This option allows you to manually amend case types, amend case type codes and amend standard fees. You should not have to use these options as all the information needed for LAA work will be in your database and updated by LOLA's automatic updates. The options are here just so that manual amendments can be made if necessary. If you need any assistance with these options, please contact the Peapod Helpline.

Making Cases Confidential

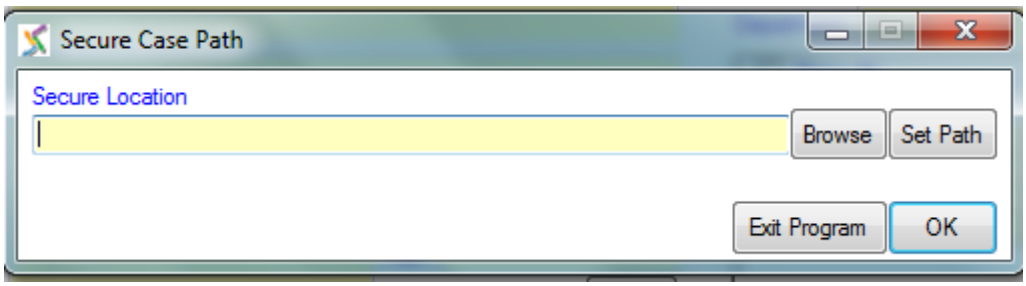
NB. Only a User with Partner access rights can do this and only at the time the New Case is put on the system.
When a Partner creates a new Case, they can make it inaccessible to other Users by password protecting it.
Do this by completing the Password box.



An Administrator or a Partner can make those cases even more secure by telling LOLA to store any password protected case files in a different location to the unprotected cases.

Set the location for password protected files

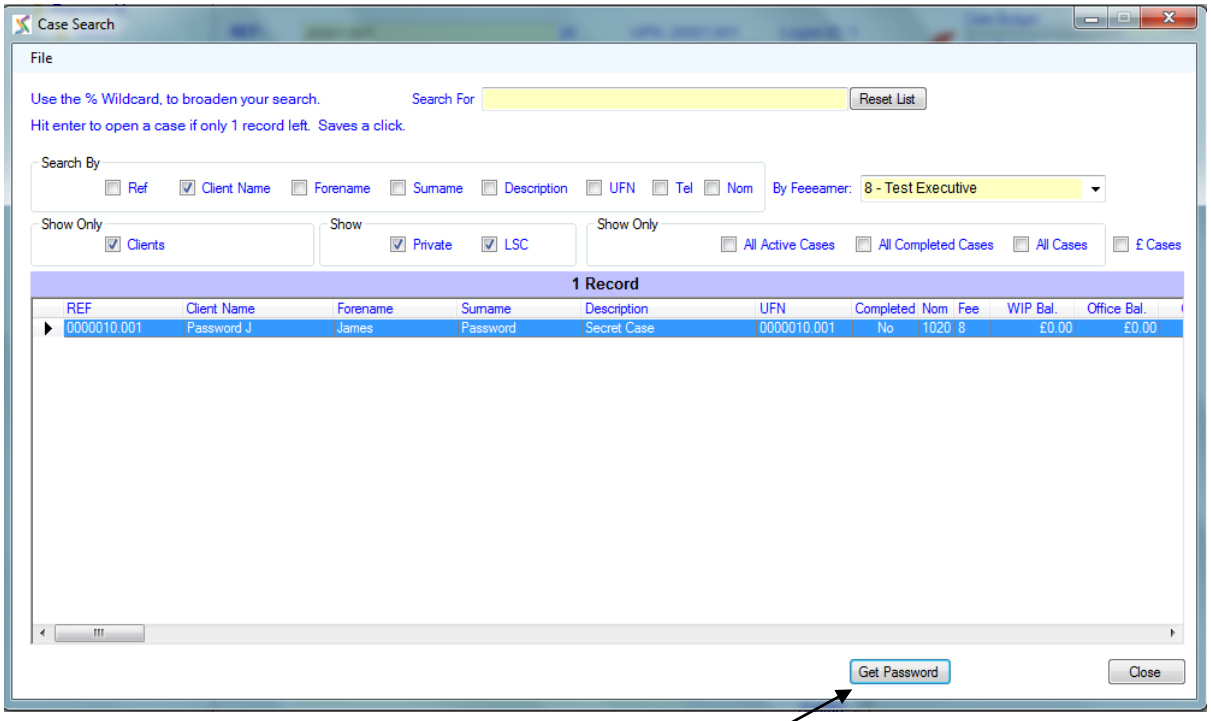
Select the ***Administrator>System Setup> Secure Server Path*** option which brings up the Secure Case Path window.



Click the **Browse** button to browse to a location where the password protected files should go. Ideally, the location should be a drive where access is restricted to Administrators of your Firm's computer systems. Once you have found the location click the **Set Path** button to confirm. Only cases whose passwords are created after this location has been set will have their files stored in this location.

Retrieve the Password for a Case

NB. Only a User with Partner access rights can use this option
Select ***Administrator>System Setup>Retrieve Case Passwords***. This will bring up the Case Search window.

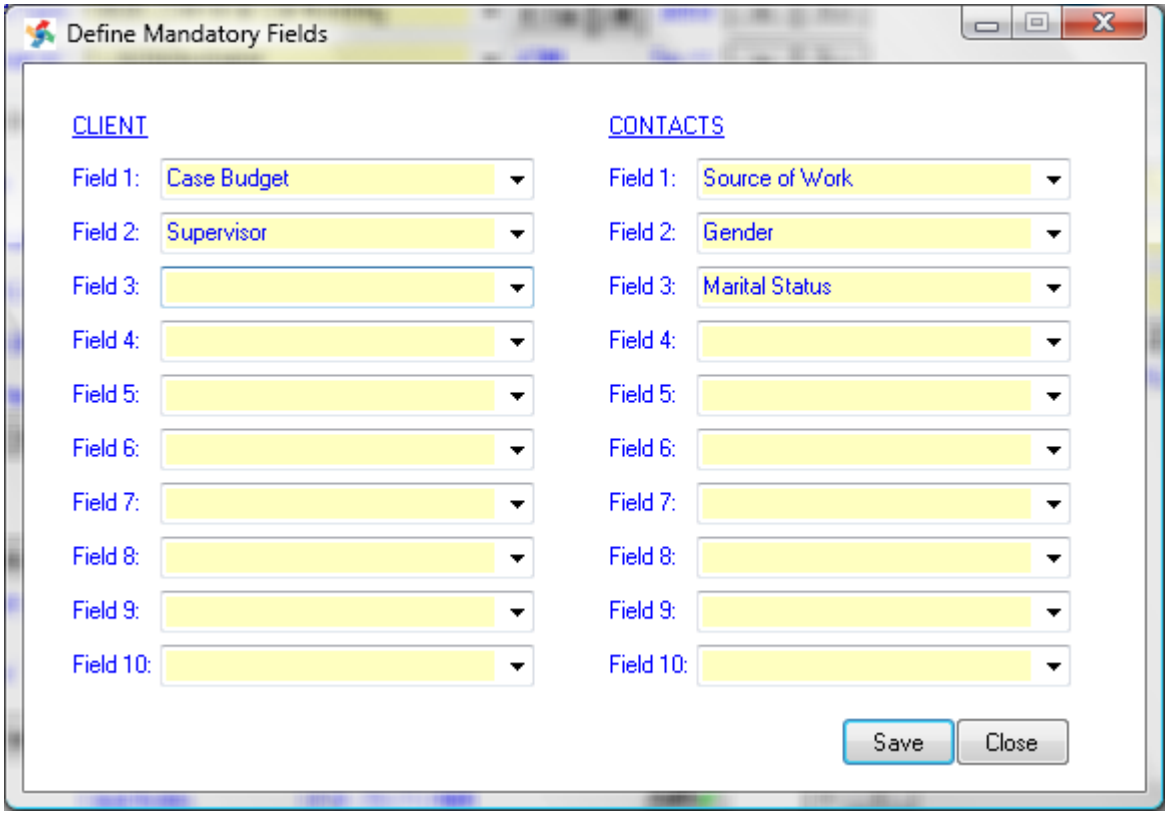


Use the Case Search window to find the case for which you require the password. Click on the grey box to the left of the case to highlight it in blue then click the **Get Password** button. A box will appear on the screen telling you the password for that case.

Mandatory Fields

As an Administrator, you can force Users to complete certain fields when adding new clients to LOLA or opening new cases. Your Firm may wish to do this to make sure you capture certain data in your database.

Select ***Administrator>System Setup>Mandatory Fields*** and the Define Mandatory Fields window will open. You can select up to 10 fields in the Client or Contacts windows that a User must complete.



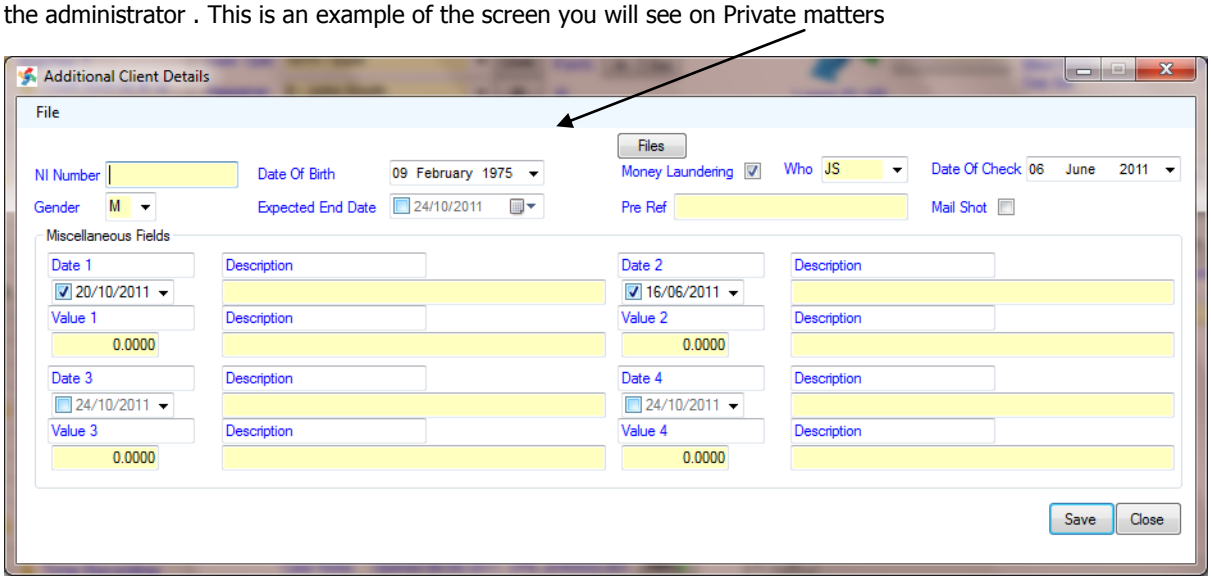
Do this by using the drop down arrows at the right of each Field to select the boxes that you want the User to complete. Once you have completed your selection click the **Save** button. You can amend the chosen fields at any time by altering your choices and clicking the **Save** button. If you want to stop a field being mandatory use the delete button to clear it from the Field box.

Tip

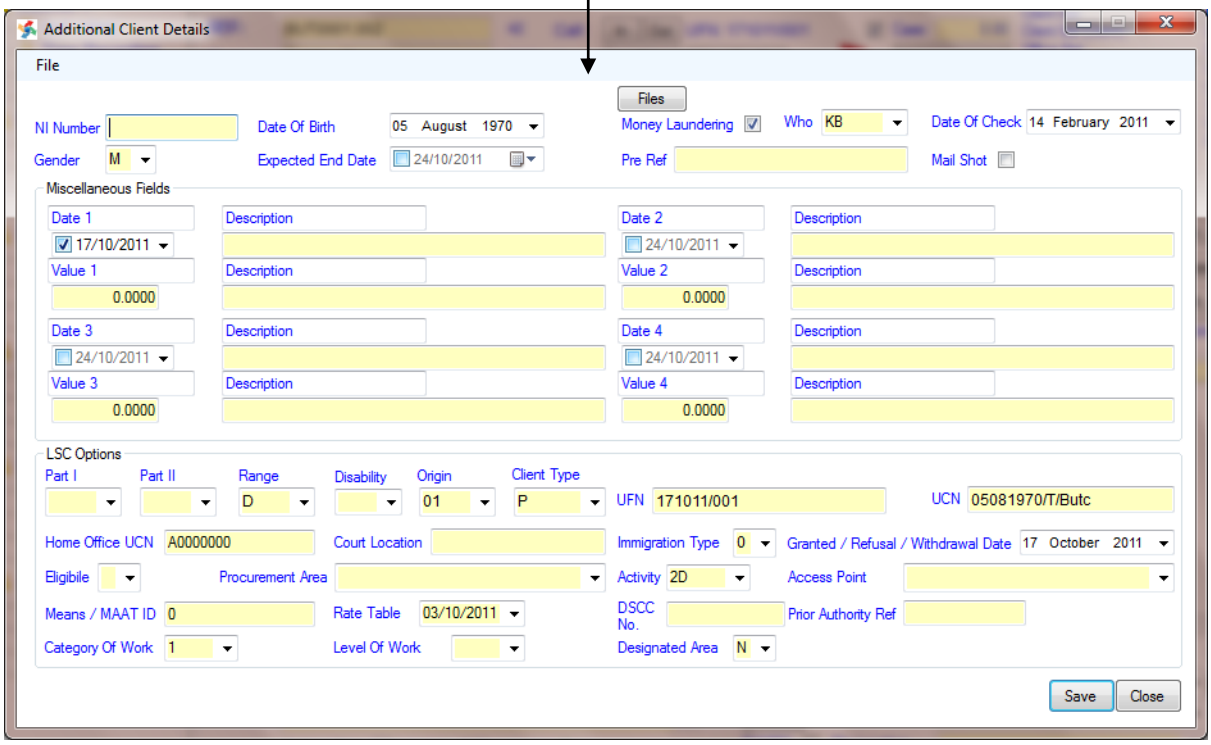
If you find that Users are not entering all the information required, then make the fields that they are missing out mandatory. Those fields will have a # symbol with a yellow background next to them so that User's can see what fields they must complete when creating cases and contacts

Miscellaneous Fields

The **'Miscellaneous Fields'** (seen on the 'More' button on the client page) can now have labels customised by the administrator . This is an example of the screen you will see on Private matters



This is an example of the screen you will see on LAA matters



If you are logged in as Admin, simply change the text in the labels, on any case. The changes will be reflected throughout the system.

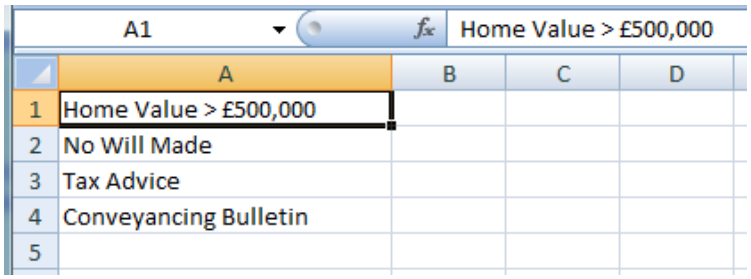
Marketing

You can use LOLA as a marketing tool to send marketing information to your Clients on a selective basis. As an Administrator, you can define the categories used during a search of your database, in order to select which Clients should receive what marketing material.

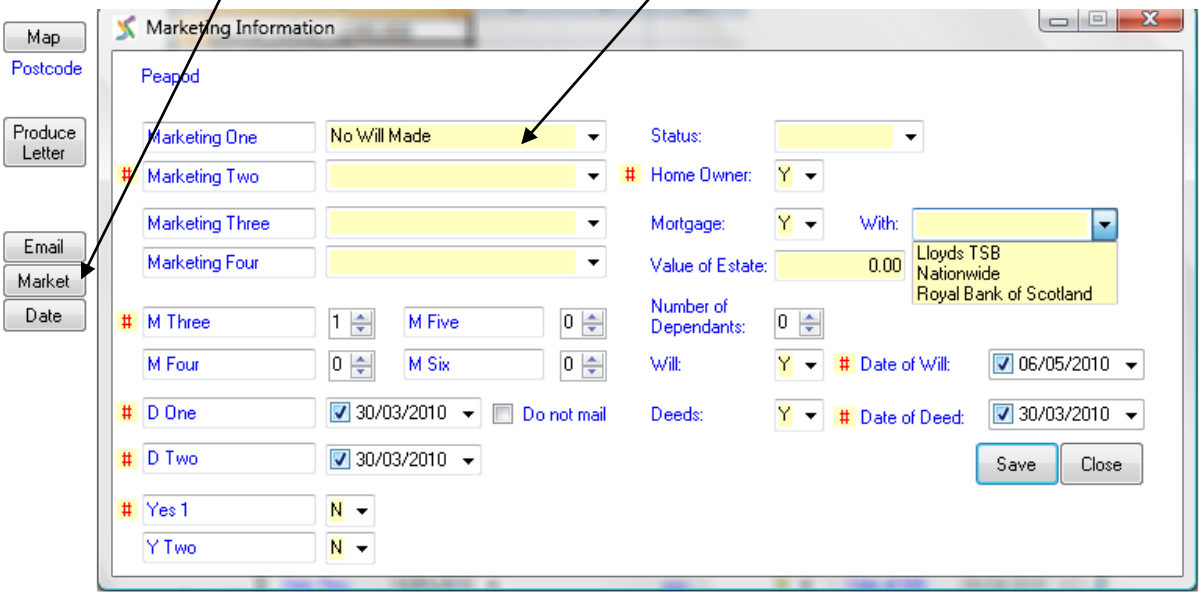
Set Marketing Criteria

Select ***Administrator>System Setup>*** ***Marketing>Data1.csv***

This will open a spreadsheet called Data1.csv in which you can put the criteria your Firm requires. Edit this spreadsheet by putting each criteria that you want in a row in column A, then save the file. You can save a second, third and fourth set of criteria by clicking the Data2.csv, Data3.csv and Data4.csv file options.



When you click the **Market** button in the Add/Amend Contact window the Marketing Information window appears. These labels will appear in the dropdown list of the *Marketing One* box. What you put in the Data2.csv file will appear in the *Marketing Two* dropdown list.

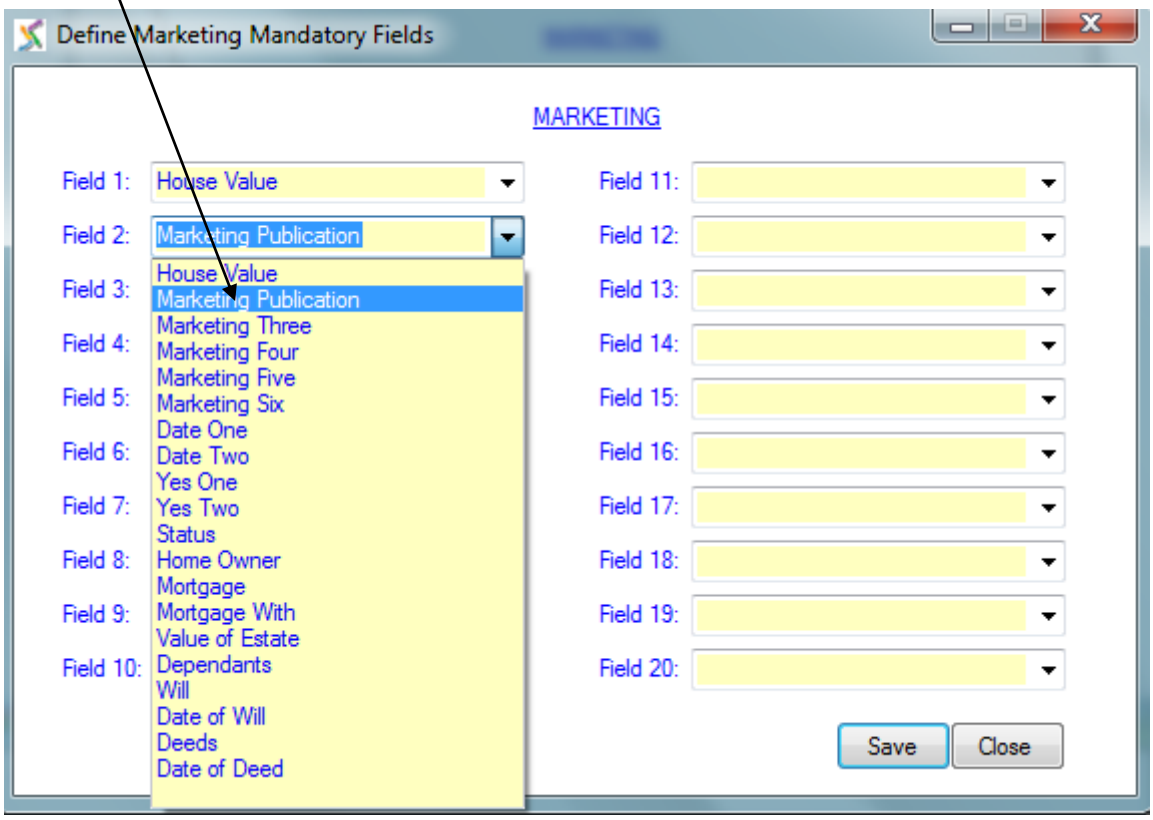


Customising the Marketing Information Box Labels

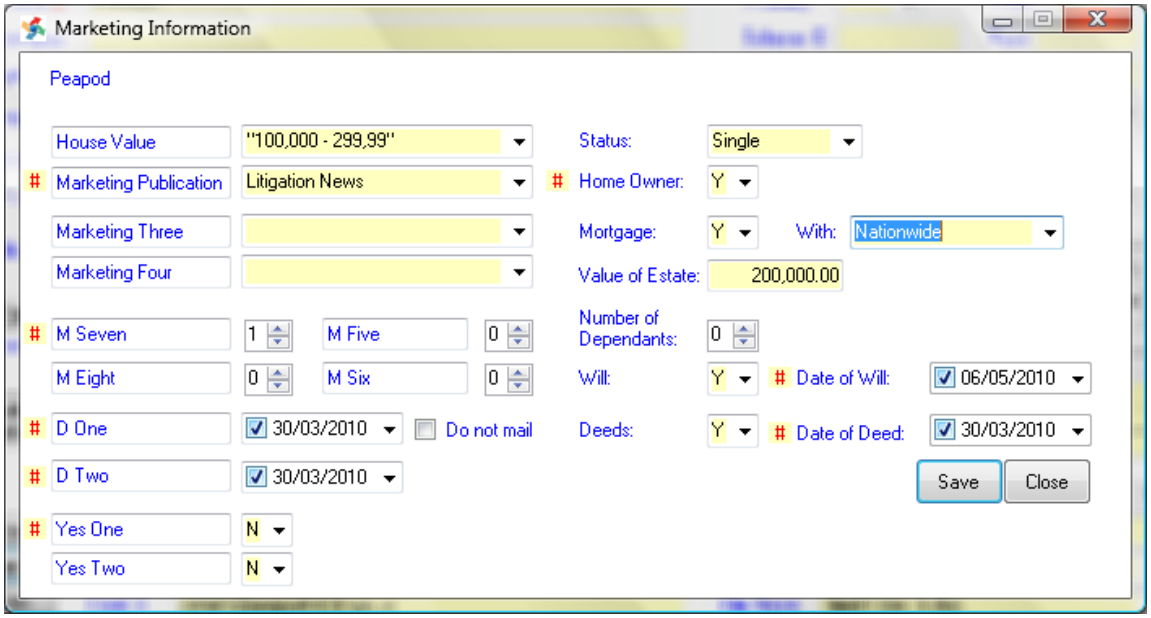
You can change the labels for each of the boxes on the left hand side of the Marketing Information window by opening the window when looking at any contact screen and then typing the new labels into the label fields. After typing these in, the new title for each label will appear throughout LOLA. Using this facility will make it much easier for Users to remember what each box means.

Users can set up a complex pattern of categories by using the options available in *Marketing One, Two, Three* and *Four* boxes and the four number options seen underneath. In addition, Users can add additional information about the client using the boxes on the right hand side of the window. As a result, it is possible to define exactly who should receive the mailings that are being sent out. If you wish to exclude any particular contact from all marketing campaigns, click the *Do Not Mail* box.

If you wish, you can make completing any of the fields in the Marketing Information window mandatory. Select ***Administrator>System Setup> Marketing>Mandatory Fields.*** This will open the Define Marketing Mandatory Fields window. Now select which fields a User must complete once they open the Marketing Information window for a contact. Click on the grey box to the right of each drop down box and choose the appropriate field title.

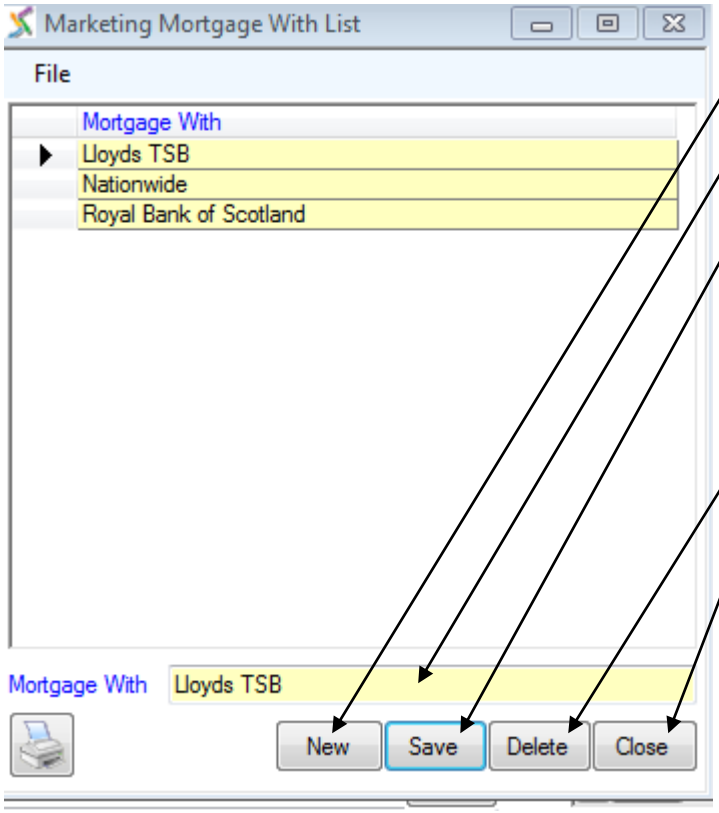


When a User opens the Marketing Information window, the fields that you have marked as Mandatory will have a red # mark next to them. A User will not be able to close the Marketing Information window until they have completed the fields you have chosen.



Create a Marketing 'Mortgage With' List

In order to populate the list of 'Mortgage With' options for a User to choose from, select ***Administrator>System Setup> Marketing>Mortgage With List.*** This will open the Marketing Mortgage With List window.



Click the **New** button to create a new entry in the List.

Type the details in the Mortgage With box.

Click **Save**.

You can edit an entry by clicking on the grey box to the left of the entry and then typing the amendments in the *Mortgage With* box.

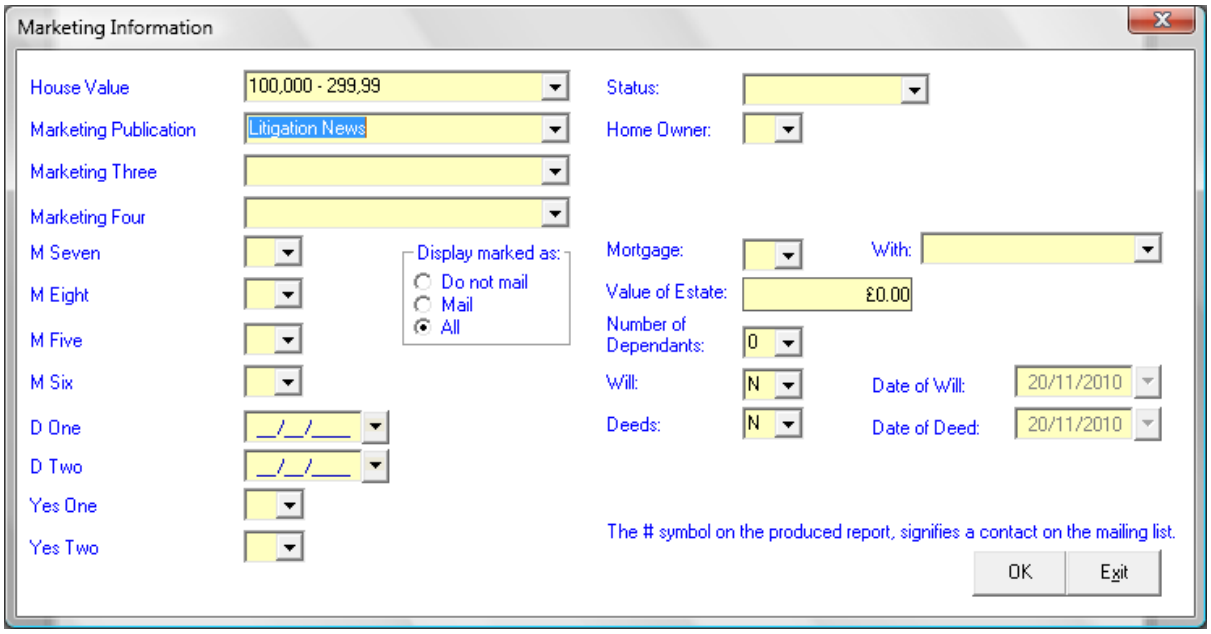
If you want to delete an entry, click on the grey box to the left of it and then click the **Delete** button.

Click **Close** to close the window

In order to carry out a mailing based on the Marketing Information click the **Reports** button on the LOLA shelf at the bottom of the main window.

This opens the Report Writer window. In the Report Writer you can either generate a report by selecting ***General>Client Reports>Marketing (G1.8)*** or ***Marketing by Fee Earner (G1.8a)*** this will produce a report based on the criteria you select. Alternatively choose the ***Excel>Marketing in Excel*** option to produce a Spreadsheet.

In each case the Marketing Information window will open.



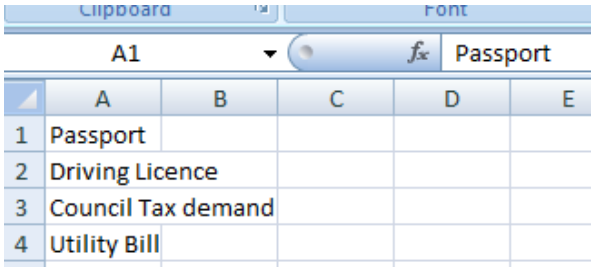
Configure the Marketing boxes as you require and click **OK**. This generates the Report or a Spreadsheet if you chose the Excel option. In each case, you will see the contacts whose details contained in the Marketing section of the Contact Database match the selected criteria. If you save the Spreadsheet, you can use it as a source document for a mail merge in Microsoft Word or as a mailing list for a professional marketing campaign.

Money Laundering Documents

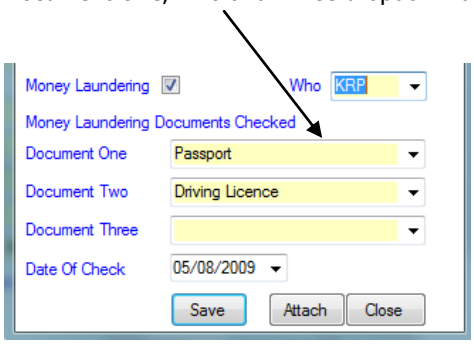
LOLA allows the Firm to set which Money Laundering Documents it is prepared to accept as proof of identity. The Administrator sets up that list.

Set up a List of Acceptable Documents

Select ***Administrator>System Setup> Money Laundering Documents.csv***



A Spreadsheet opens allowing you to put in Column A the list of documents. That list will then appear in the *Document One*, *Two* and *Three* dropdown boxes in the Money laundering Contact Files window.



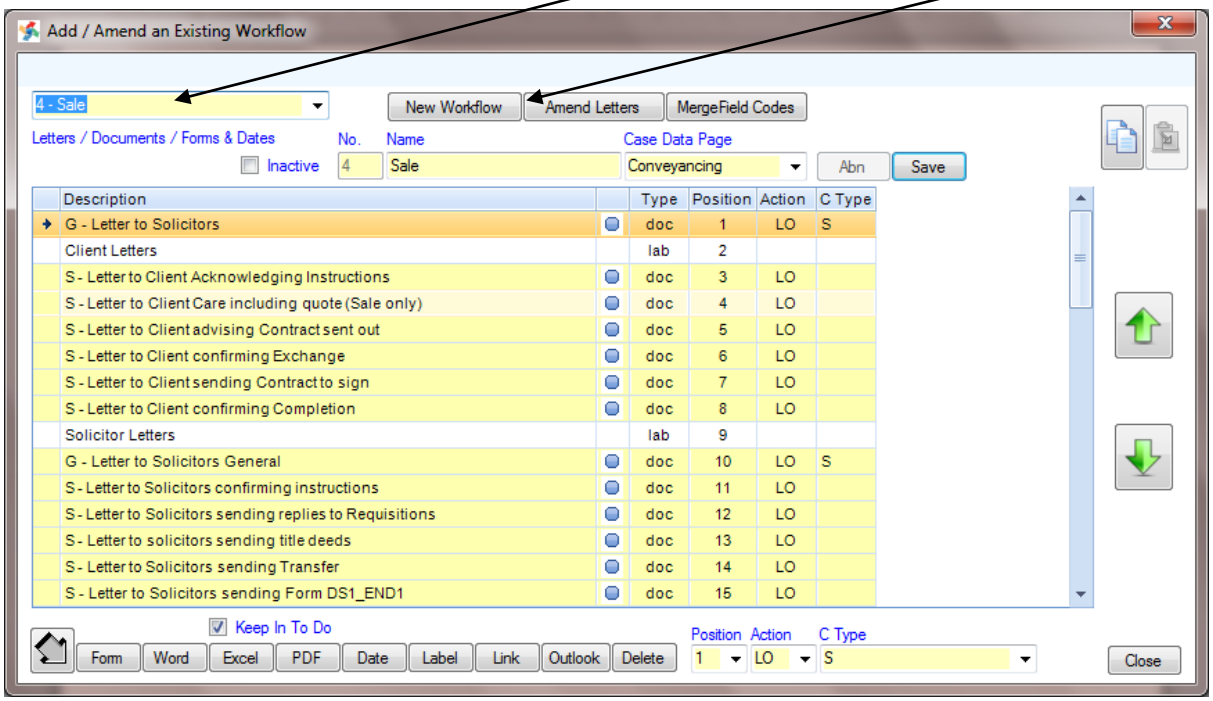
Workflows

In LOLA it is simple to create or change Workflows that Users follow when dealing with their cases. A Workflow can contain Letters, Documents, Forms, Dates and Tasks.

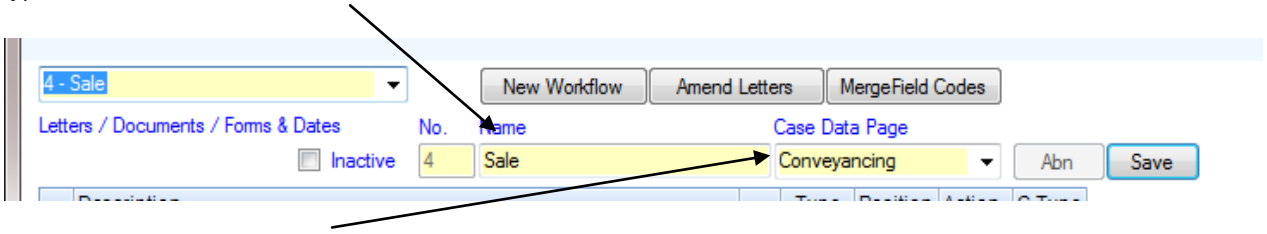
Add a New Workflow

Select ***Administrator>Workflow> Workflow Setup*** and the Add/Amend an Existing Workflow window will open.

If you wish to add a new Workflow that does not appear in the Workflow dropdown window, click the **New Workflow** button.



The Workflow dropdown window will clear and the cursor will move to the Workflow *Name* box where you can type the name for the new Workflow.



Then select the Case Data type that the User will see when they click on the Case Data button for this particular workflow.

Case Data

This area of LOLA holds the details about a case. The User accesses it to put data about a case into LOLA and to review details of the contacts assigned to the case. In the *Case Data Page* box there are a number of case types. Selecting a Case Data Page that matches with a Workflow will give the User a selection of Contact Types and Data details that are relevant to that type of work. Selecting a General Case Data Page will give the User every Contact Type and Data details that LOLA has.

Once you have made the appropriate choice of Case Data page click the **Save** button. If you wish to abandon the creation of the new Workflow, click the **Abn** button instead.

You may choose to add each item to your New Workflow separately or you may copy everything from an existing Workflow and edit the entries that you have copied.

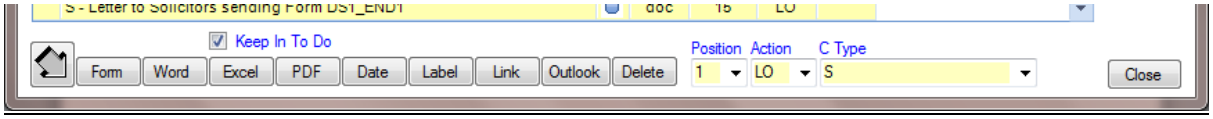
Add Items to a Workflow

N.B. Before you add items to a Workflow read the section of this Manual dealing with Letters as this explains about creating template documents that are items within a Workflow.

First, select the Workflow you want to edit by selecting it in the *Workflow* dropdown box.

The item you add will appear immediately above the row with the black triangle on the left. In order to save time moving items around, select the row below the one where you wish your new item to appear before adding it.

To add an item click on the button for the type of item you wish to add, from the row of buttons at the bottom of the Add/Amend an Existing Workflow window.



Word, Excel and PDF

To add one of these items, you need to navigate through the folder structure of your PC to find the file of the item that you wish to add to the Workflow. Whilst you can add items from anywhere, it is sensible to have the master file saved somewhere in the **L:\LEGALOffice\System\Letters** folder or a subfolder of that folder. You can group letters, spread sheets and PDFs in sub folders of the Letters folder to make it easier to find the one you want. Remember if you move the file out of the folder after you have assigned it to a Workflow then the link between the Workflow and the file will be broken and the workflow automation will no longer work.

N.B. When adding a Word Document to the workflow the 'Files of Type' drop down has been amended so that you no longer need to select DOCX files from a separate option. Throughout the system, choosing 'Word Document', will display both DOC and DOCX file types. This is the same with Excel Workbooks, which now display both XLS and XLSX files. The file format DOCM (Word Macro-Enabled Document) can now be added to and produced from a workflow.

Forms

If the item you are adding is a Form, these are in the **L:\LEGALOffice\Formslib** folder or a subfolder of that folder.

If the item you have added is one that the User will need to generate more than once during a case (e.g. Blank letter to Client) then tick the *Keep In To Do* tick box. This stops the item from disappearing from the Workflow once generated. The User can then generate another of the same item later on from the Workflow.

Dates

N.B. before adding Dates to a Workflow read the Dates and Tasks section of this Manual, so you understand how they work.

Clicking on the **Date** button will bring up the Date/Task Types window. From here, you can select a date or task and insert it into the Workflow by clicking on the **Assign** button at the bottom of the window.

Labels

To break up a Workflow into sections you can add labels by clicking the label button and typing the label that you want to appear in the Workflow.

Links

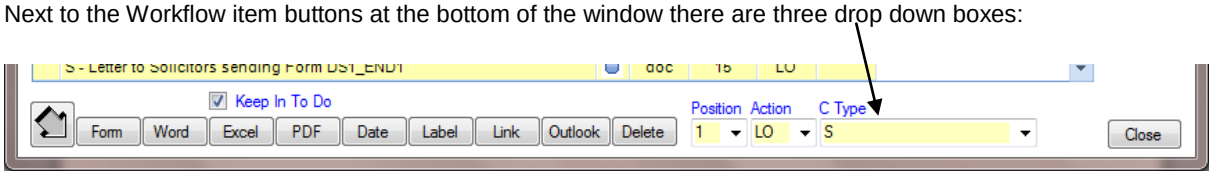
You can add links to web pages as part of your workflow. This will add the web site address to the workflow so that Users can easily access web pages that they might need to visit during the course of the Case.

Outlook Template

A facility has been added to allow you to enter field codes into Outlook Email Templates and merge the data through LOLA workflow, similarly to a word document.

N.B. By double-clicking an item in Workflow Setup, you can open the file to review.

Next to the Workflow item buttons at the bottom of the window there are three drop down boxes:



Position: Allows you to assign the position number of an item. Alternatively, you can use the arrows on the side of the Window to move an item up or down the Workflow

Action: How you set the action determines how the item will be dealt with in the Time Recording part of LOLA.

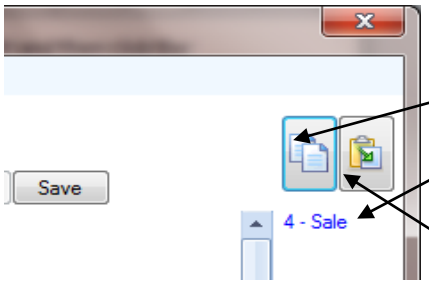
DOC = Document (Not charged as an item)
FO = Form Out (Charged at the rate set for Forms Out)
KD = Key Date (Not charged)
LO = Letter Out (Charged at the rate set for Letters Out)
PDF = PDF File (Not charged as an item)
XLS = Excel Spreadsheet (Not charged as an item)
Lnk = Internet Hyperlink (Not charged as an item)

C Type: Links a Letter to a particular type of Contact. If a Case has more than one of that Contact Type assigned to it by the User, on generating a General letter from the Workflow, LOLA will ask the User to select the contacts to which they wish to send the letter (see the section Create Letters that Use the Multiple Recipient option below).

Delete an Item from a Workflow

To delete an item from a Workflow, select the item by clicking in the grey box to the right of it and then click the **Delete** button at the bottom of the window.

Copy an Existing Workflow



To copy a Workflow select the Workflow you wish to copy in the Workflow dropdown box then click the **Copy** button in the top right hand corner of the window.

The name of the Workflow you are copying from will appear below the button.

Next select the Workflow you wish to copy to, from the Workflow dropdown box.

Then click the **Paste** button. Choose Yes to confirm the action when asked.

Delete a Workflow

If you want to delete a Workflow that you no longer use click the *inactive* tick-box next to the Workflow name at the top of the window. This will not delete the Workflow from LOLA but will mean that a User cannot select it when creating a new case or changing a Workflow type.

Reassign a Workflow

It is possible to re-assign the name and number of existing workflows in a batch. This facility is largely for OFFICECase Users who may wish to put their Workflows in a different order when upgrading to LOLA. If you wish to carry out this operation, please contact our Helpline and a member of our Support Team will assist you.

Letters

General

The templates that LOLA uses to generate letters and documents in a case are standard Microsoft Word documents containing Mergefield Codes that use the Word mail merge function to merge data from the LOLA database into the template. If you want to add new template letters to LOLA you should include Mergefield Codes in those templates which merge the data from the **"**Case Data**"** file into the template letter or document.

Template letters are stored in the L:\LEGALOffice\System\Letters Folder. What you name your own letters and where you place them within the Letters folder is very important. LOLA only allows two folder levels beneath the Letters Folder. It also requires unique names for its template letters and documents.

When LOLA creates a letter from a Workflow, it will look through the Letters folder and open the first template that it finds with a name that matches the template name in the Workflow. Therefore, it is essential not to have duplicate file names in different folders. To this end the LOLA template letters need prefixes to differentiate between different work types (e.g. "CP - Letter to solicitors" may be the commercial purchase version of the blank letter to solicitors and "F - Letter to solicitors" the family version). Following this principle, each Department can determine the layout and content of their blank letters.

Following the above protocols you can create your own letters from scratch. In order to get the letters to use information from the database you need to have an understanding of how Mergefield Codes work in Microsoft Word.

Mergefield Codes

To find out what the available Mergefield Codes are, select ***Administrator>Letters>MergeField Codes*** or from the Add/Amend an Existing Workflow window click the **MergeField Codes** button. This action compiles a Word document that contains all of the Mergefield Codes that are available. You can copy and paste the relevant Codes from this document into your letter templates.

To find which Mergefield Codes are relevant to the letter or document you are creating, open the Case Data page for the Case type where you intend to assign the letter or document. Then hover your mouse over the fields that you want to take the information from. A pop up will appear giving you the name of that field. Copy that Mergefield into the position in your letter where you want the information to appear.

Linked Files

In addition to using Mergefield Codes in template letters LOLA also uses the Microsoft Word function INCLUDETEXT to bring other files into a letter when it is created. Typically, the INCLUDETEXT statement is in the first line of the template so that the file that contains the header MergeField Codes for that contact type will merge into the final version of the letter created. The Header file contains everything from the first line of the Addressee to the Salutation. It works this way so you have one header file for each Contact Type. In the future if you need to change your letterhead, you only have to change the header for the contact type rather than change all the letters you have in the system.

To see the files linked to a template letter, open it and while holding the ALT key press F9. You will now see the details of fields that held in the document. At the top of the letter you will see something like: {INCLUDETEXT"L:\\LEGALOffice\\System\\Letters\\Header_Client.doc"*MERGEFORMAT}. This example shows that the Header_client.doc file will merge into this file when LOLA creates a letter from it. To change the Header_ file link, edit the INCLUDETEXT statement. To enable faster merging of documents Microsoft Word stores linked files. So the details that you see when you hold down the Alt key and press F9 will not change until you refresh the link. To refresh the links in a document, select all the text (Hold down CONTROL and press A) then press F9. You should do this every time you open a template letter to edit it so that what you see on the screen is the latest version of the files linked to the template.

Amend Existing Letters or Document Templates

Select ***Administrator>Letters>Amend Letters.*** This will take you to the Letters folder so you can browse to any existing document and add merge fields to it. Once you have opened the document you want to change, you can make any changes necessary to it. If you have the MergeField Codes document open at the same time, you can copy and paste MergeField Codes from it to your document. Alternatively if you have another document where you know there is the Mergefield Code that you want, copy the Code from that document.

N.B. This facility has been amended so that you can now choose EXCEL Workbooks and Outlook Templates to amend. Simply choose from the 'Files of Type' drop-down.

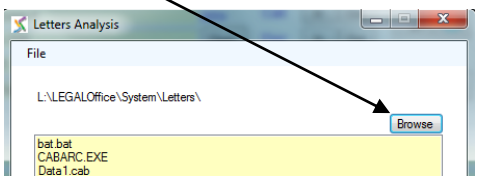
Create Letters that Use the Multiple Recipient Option

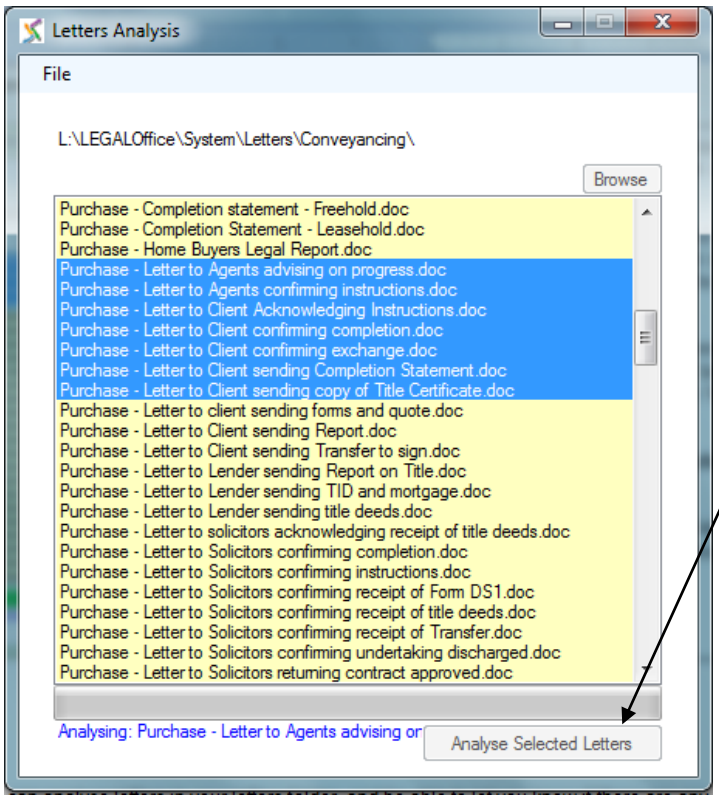
You can create template letters that allow the User a choice as to whom to write to from multiple Contacts of the same type that are assigned to a case. To create such a template it has to link to a General header file. A number of letters have been linked to the Header_General.doc file for this purpose. They are in the "General Letter Set" folder and their filename ends in General (e.g. "Letter to Insurance General.doc"). This template will provide the multiple recipient option provided (a) it is actioned through a workflow and (b) when it is added to a workflow the C Type is set to "IN" and (c) there is more than one Insurance Company contact assigned to the case.

N.B. By assigning the contact type **"ALL"** to a letter in the workflow you will be able to generate multiple letters for contacts of any type assigned on a case.

Check a Template for Invalid Mergefield Codes

The merging of data from the database to a template document will fail if there is an invalid Mergefield Code in the template. This function allows you to analyse letters in a folder to check if they have any invalid MergeField Codes. Select ***Administrator>Letters>Letters Analysis*** to open the Letters Analysis window. Click the **Browse** button and navigate to the folder that contains the files you wish to check. Select the first file in the folder and click the Open button.




Letters Analysis
File
L:\LEGALOffice\System\Letters\Conveyancing\
Browse
Purchase - Completion statement - Freehold.doc
Purchase - Completion Statement - Leasehold.doc
Purchase - Home Buyers Legal Report.doc
Purchase - Letter to Agents advising on progress.doc
Purchase - Letter to Agents confirming instructions.doc
Purchase - Letter to Client Acknowledging Instructions.doc
Purchase - Letter to Client confirming completion.doc
Purchase - Letter to Client confirming exchange.doc
Purchase - Letter to Client sending Completion Statement.doc
Purchase - Letter to Client sending copy of Title Certificate.doc
Purchase - Letter to client sending forms and quote.doc
Purchase - Letter to Client sending Report.doc
Purchase - Letter to Client sending Transfer to sign.doc
Purchase - Letter to Lender sending Report on Title.doc
Purchase - Letter to Lender sending TID and mortgage.doc
Purchase - Letter to Lender sending title deeds.doc
Purchase - Letter to solicitors acknowledging receipt of title deeds.doc
Purchase - Letter to Solicitors confirming completion.doc
Purchase - Letter to Solicitors confirming instructions.doc
Purchase - Letter to Solicitors confirming receipt of Form DS1.doc
Purchase - Letter to Solicitors confirming receipt of title deeds.doc
Purchase - Letter to Solicitors confirming receipt of Transfer.doc
Purchase - Letter to Solicitors confirming undertaking discharged.doc
Purchase - Letter to Solicitors returning contract approved.doc
Analysing: Purchase - Letter to Agents advising or
Analyse Selected Letters

Now you will see all the files in that folder in the Letters Analysis window. Next, select which ones you want to analyse by highlighting them. You can do this either by holding down the left button on your mouse and dragging over the files you want to process. If all the files are together in the list click on the first one, then hold the shift key down and click on the last one. To select individual files hold the Ctrl key down and click on each file you wish to process.

Once you are happy with your selection click the **Analyse Selected Letters** button.

LOLA will then go through each letter and will produce a text file listing those files with invalid Mergefield Codes. If no invalid MergeField Codes are found, LOLA will report 'Success' next to the button. NB. Processing a large number of letters will take a long time.

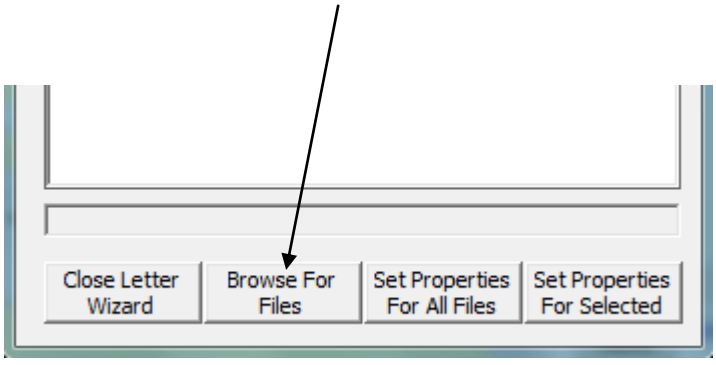
If you receive a list of the documents that have invalid MergeField Codes use the Amend Letters function to edit the template letter or document listed.

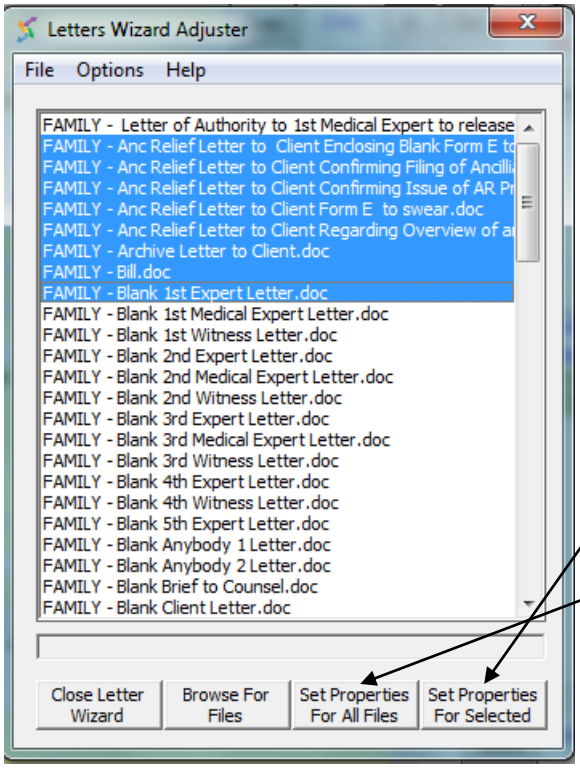
If you wish to stop the Letter Analysis at any time, right click within the Letters Analysis window and on the pop-up menu that appears, click 'Deselect All Files'. LOLA will complete the scan of the current letter and stop.

Using the Letter Wizard

The Letter Wizard allows you to change the format of your template letters in a batch. It is an automatic process so you are strongly advised to take a backup of your template documents before using the Wizard. Any mistakes you make in running the Wizard with incorrect settings cannot be undone.

You can also link a header and footer to each template. Select ***Administrator>Letters>Letters Wizard*** then the Letter Wizard window will appear. At the bottom of the window are the control buttons. Click the **Browse For Files** button to search for the directory that holds the letter templates that you want to change. Then click on one of the files in the directory and click the Open button.




Letters Wizard Adjuster
File Options Help
FAMILY - Letter of Authority to 1st Medical Expert to release
FAMILY - Anc Relief Letter to Client Enclosing Blank Form E to
FAMILY - Anc Relief Letter to Client Confirming Filing of Ancill
FAMILY - Anc Relief Letter to Client Confirming Issue of AR Pr
FAMILY - Anc Relief Letter to Client Form E to swear.doc
FAMILY - Anc Relief Letter to Client Regarding Overview of a
FAMILY - Archive Letter to Client.doc
FAMILY - Bill.doc
FAMILY - Blank 1st Expert Letter.doc
FAMILY - Blank 1st Medical Expert Letter.doc
FAMILY - Blank 1st Witness Letter.doc
FAMILY - Blank 2nd Expert Letter.doc
FAMILY - Blank 2nd Medical Expert Letter.doc
FAMILY - Blank 2nd Witness Letter.doc
FAMILY - Blank 3rd Expert Letter.doc
FAMILY - Blank 3rd Medical Expert Letter.doc
FAMILY - Blank 3rd Witness Letter.doc
FAMILY - Blank 4th Expert Letter.doc
FAMILY - Blank 4th Witness Letter.doc
FAMILY - Blank 5th Expert Letter.doc
FAMILY - Blank Anybody 1 Letter.doc
FAMILY - Blank Anybody 2 Letter.doc
FAMILY - Blank Brief to Counsel.doc
FAMILY - Blank Client Letter.doc
Close Letter Wizard
Browse For Files
Set Properties For All Files
Set Properties For Selected

The Letter Wizard will then bring all the files from that directory into its window.

If you only want to change certain files highlight them by holding down the left button on your mouse and dragging over the fields you want to process. If all the files are together in the list click on the first one and then hold down the shift key and click on the last one. To select individual files hold the Ctrl key down and click on each file you wish to process.

If you want to check a file in the list double click on it and it will open in Word.

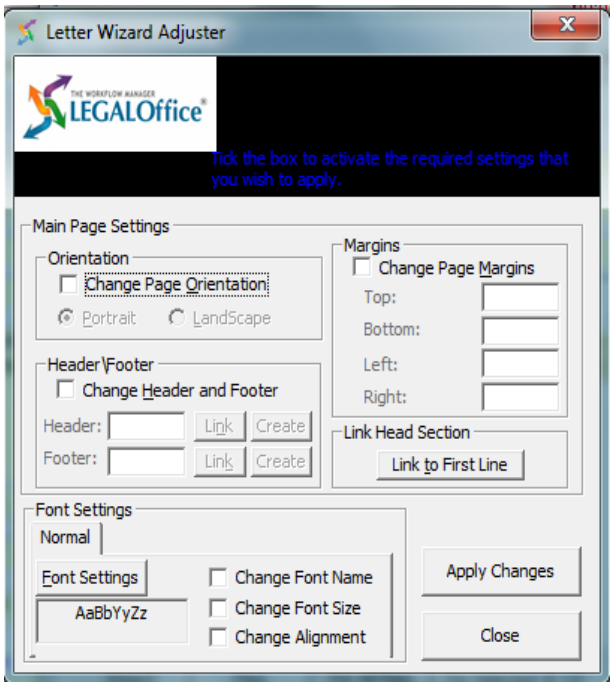
Once you are happy with the selection of files you have highlighted click the **Set Properties For Selected** button.

If you want to change all the files in the folder click the **Set Properties For All Files** button.

N.B. Do not use the **Set Properties For All Files** button if you are linking a header or file to your templates and the header or footer file are in the same directory as the one you are processing.

If you want to see Microsoft Word making the changes to the files you have chosen to change, select ***Options>Show Word Working*** before clicking the "Set Properties" button

Once you have clicked one of the "Set Properties" buttons the Settings window appears.



In this window, you can enter the settings that you want to apply to each document selected in the previous window.

You can also link a file that will merge into the header or footer of the document when it is created using LOLA. (e.g. A Word document containing the header or footer of your firm's letterhead)

You can also link a file such as a general header that will merge into the top of the body of the document when it is created using LOLA.

Once you are happy with all the settings for the documents you have selected, click the **Apply Changes** button.

If you are processing a number of documents LOLA may take a long time to complete the task.

Contacts

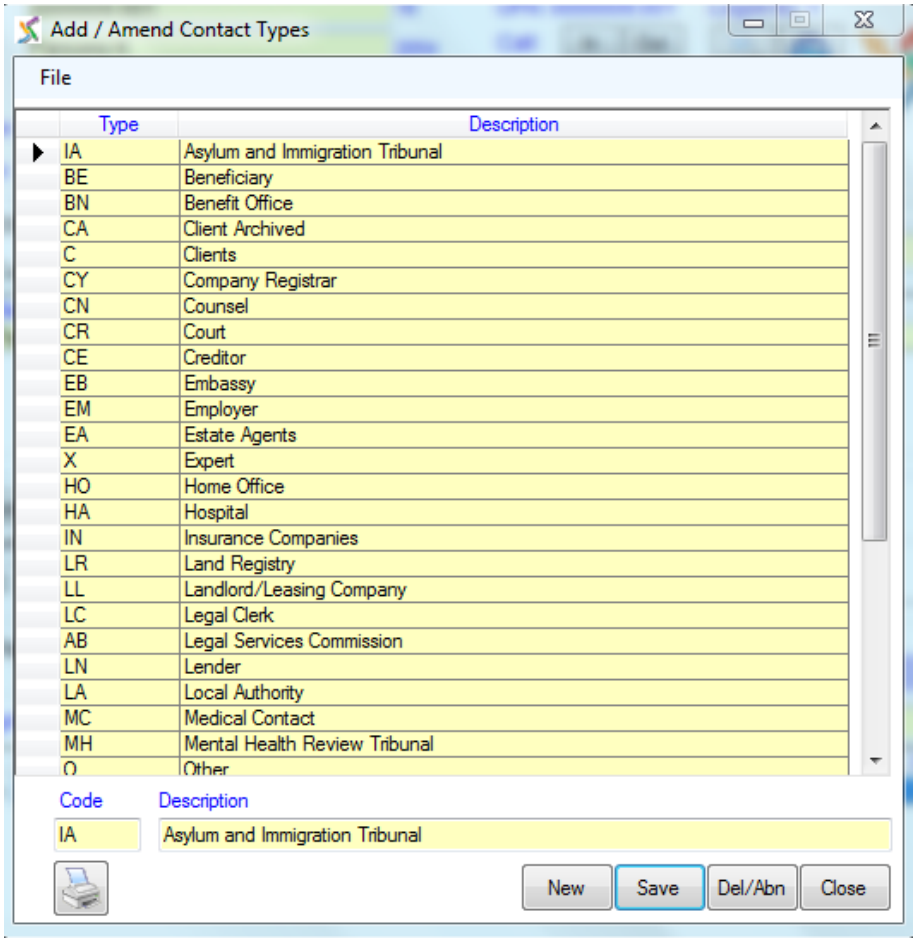
Managing the Contacts Database

As an administrator you can use the ***Administrator> Contacts>Contacts Database*** option to edit or delete contacts from your contact database. Choosing this option will open the Add Amend / Contact Details window in the same way as selecting a contact from the Address Book. You will probably want User to keep the contact details up to date but we have included this menu option for completeness.

Contact Types

LOLA is pre-configured with various contact types but you may come across a contact type that is not listed in the Contact type list.

Select the ***Administrator> Contacts>Contact Types*** option and the Add / Amend Contact Types window will appear.



Add a New Contact Type

Click the **New** button. Each contact type must have a unique Code of up to 5 letters or numbers which you enter in the *Code* box. Then type the description of the contact into the *Description* box and click the **Save** button.
When creating new Contact Type codes it is best to use a code that has some relevance to the description.
N.B. Users will not be able to produce letters through Workflows to any new Contact Types that you add although they will be able to produce blank letters to them. They can however use the >**Assign Contact To Case As Anybody** option for those contacts that LOLA does not have a specific Contact Type for, as explained in the User Manual.

Edit the Description of a Contact Type

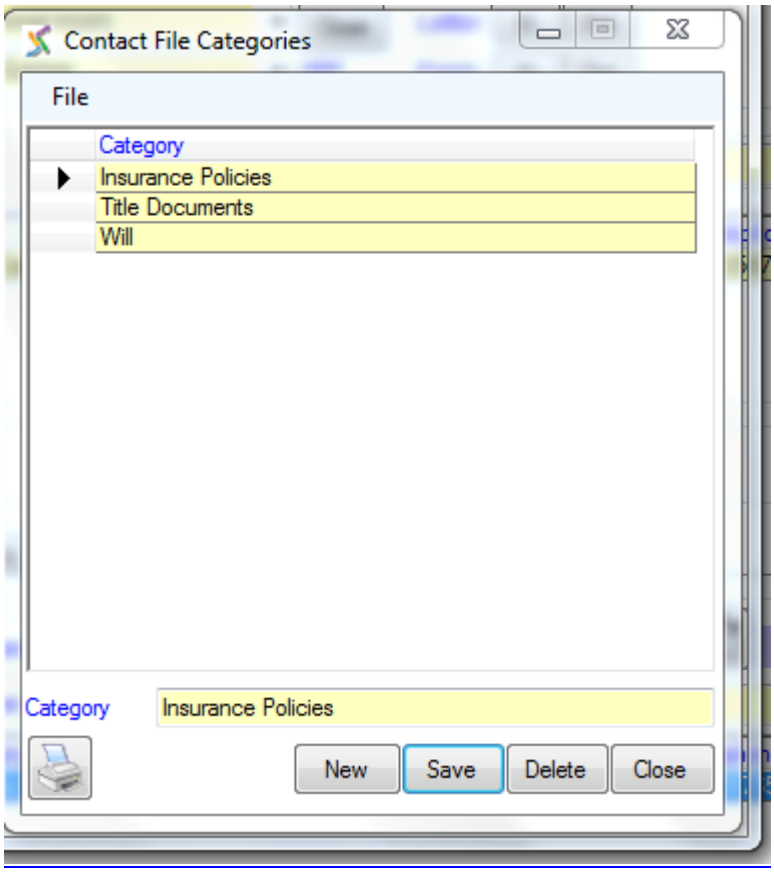
To edit the Description of a Contact Type select it from the list, so that the details are in the boxes at the bottom of the window. Then change the Description and click the **Save** button.

Delete a Contact Type

Select the Contact Type you wish to delete so that the entry is in the boxes at the bottom of the window. Then click the **Del/Abn** button. Click "Yes" when asked to confirm the deletion. **N.B.** Be careful not to delete a Contact Type for which there are existing records in the database.

File Categories

A User can store useful documents for a contact by attaching them to that contact. When doing so, the User will need to allocate the document to a Category. The list of available categories is set by an Administrator using the ***Administrator> Contacts> File Categories*** option. This brings up the File Categories window.



To create a new Category click the **New** button.

Type the description for the Category then click the **Save** button.

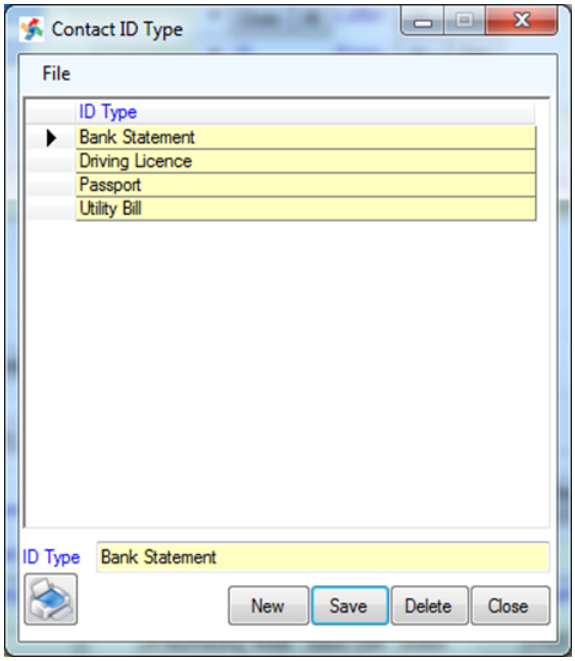
When you have finished click the **Close** button.

Once you have set up a list of File Categories, when a User attaches a Document the list that you create here will appear in the Category drop down box in the Contact Files section of the Add / Amend Contact Details window.

ID Types

This option tracks the forms of ID documentation provided by client or contact via a drop down box on the new contacts and new case screens.

To create this list select ***Administrator> Contacts> ID Types.***



To create a new ID Type click on the **New** button.

Type the description for the ID Type and click the **Save** button.

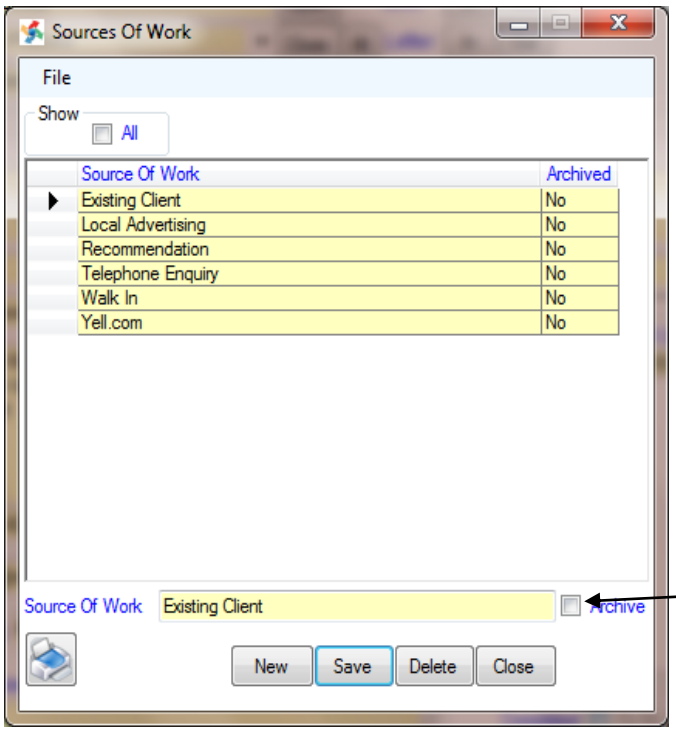
When you have finished click the **Close** button

Once you have set up a list of Sources of Work when a User creates a New Case the list that you create here will appear in the Source of Work drop down box in the Add / Amend Contact Details window.

Sources of Work

LOLA can track the Sources from which the Firm receives work and produce a report identifying which clients have come from a particular Source of Work.

Select the ***Administrator> Contacts> Sources of Work*** option. This opens the Sources of Work window.



To create a new Source of Work click on the **New** button.

Type the description for the Source of Work and click the **Save** button.

When you have finished click the **Close** button

Once you have set up a list of Sources of Work when a User creates a New Case the list that you create here will appear in the Source of Work drop down box in the Add / Amend Contact Details window.

You can archive Sources of Work by highlighting them and ticking the **Archive** tick box

Backup

There are two elements that require backing up in order to restore LOLA fully:

There will be a shared folder on the server that the users are mapped to. By default, the drive letter used is L:\ and the location of the share on the server will be C:\Apps or D:\Apps depending on your setup

There is also an SQL database that needs to be backed up. The default location for this is on the server is <shared folder>\legaloffice\database and will comprise of two files called LOLASQL.mdf and LOLASQL_log.ldf. Depending on your setup, you may need to stop the SQL services in order to backup these files.

Please note that the above are the default locations of the backup files but can all be checked via the share and the SQL manager.

Please note that Peapod will not routinely take backups or your data and are not responsible for looking after your backups.

Cases

Export Case Details to Excel

You can export to Excel basic details of all your active cases. Select the ***Administrator>Case>Export All Active Cases To Excel*** option. Beware that selecting this option will start the export function and if you have a lot of active cases it may take some time.

Clear Data

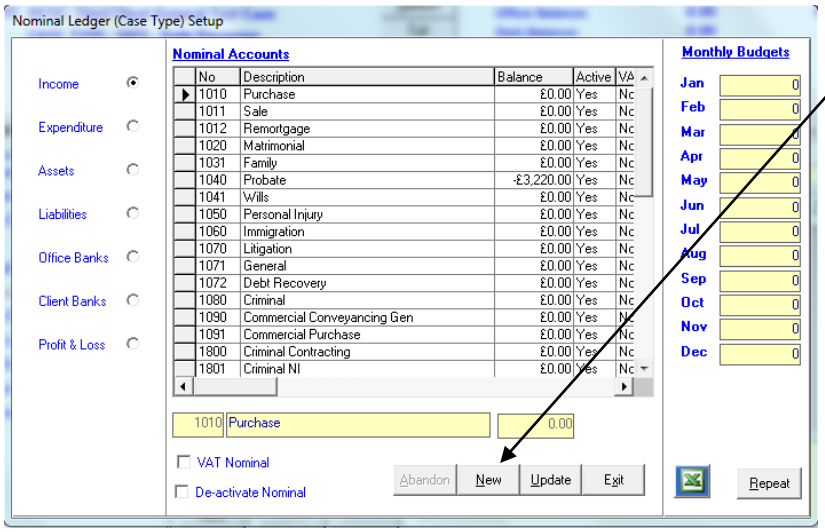
This function is only for use by Peapod Support Staff.

Case Types

To manage Case Types you have to go to the Accounts part of LOLA. If you want to add a new case type or change the name of a Case Type, open LOLA Accounts from the LOLA shelf at the bottom of the LOLA window.

In the Accounts – LOLA window select ***File>System Setup>Nominal Setup*** and the Nominal Ledger (Case Type) Setup window will appear.

N.B. If you create new case types or change the descriptions of existing ones then your actions will apply to both Case Management and Accounts because the Nominal Income Accounts are the Case Types. Be sure to agree any changes you propose to make with your Accounts Department or Bookkeeper before they are made.



To add a new Nominal / Case Type click the **New** button. Then assign a number for the Case Type. Private Case Types must have numbers between 1000 and 1799. Public funded Case Types must have numbers between 1800 and 1899 so that LOLA provides the correct time recording rates. Type a description for the Case Type and click the **Update** button.

To amend the description of a Case Type, click on the grey box to the left of the one you want to change. Its details will appear in the boxes at the bottom of the window. Change the description and click the **Update** button.

E-Learning.

There are now E-Learning modules available through the LOLA Help Menu.

These modules are a series of help videos, which demonstrate how to perform tasks within LOLA.

To access these, please ensure that you have entered your relevant support centre log in details entered into the company details, then navigate to Help menu and the choose the E-Learning.

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